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ABSTRACT

This paper discusses policy regarding learning in later life in the United Kingdom. The following are among the topics discussed in chapters 1-12: (1) the importance of lifelong learning; (2) the importance of learning to older people; (3) opportunities for lifelong learning in the United Kingdom; (4) the United Kingdom's aging population; (5) older learners' participation in learning; (6) provisions for older adults by local education authorities and in the further education, higher education, and voluntary sectors; (7) the role of information technology and broadcast media in lifelong learning; (8) the government's role in lifelong learning; and (9) lifelong learning and issues and barriers. The following are among the 63 policy recommendations listed in Chapter 13: (1) make increasing older adults' participation in education and training a policy priority; (2) ensure that local education authorities prepare lifelong learning development plans that take account of older people's unique learning needs; (3) promote distance learning as a primary means of access for older people; and (4) increase learning opportunities at work. Nineteen tables/figures and a list of abbreviations are included. Eleven tables/figures containing additional statistics, acknowledgments, and a list of advisory group members are appended. The bibliography contains 166 references. (MN)

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*A policy discussion paper on
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Shiela Carlton and Jim Soulsby

LEARNING TO GROW OLDER & BOLDER

A POLICY PAPER ON LEARNING IN LATER LIFE

Shiela Carlton and Jim Soulsby

NIACE
THE NATIONAL ORGANISATION
FOR ADULT LEARNING

Learning to Grow Older & Bolder

A Policy Paper on Learning in Later Life

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LEARNING TO GROW OLDER & BOLDER

A POLICY PAPER ON LEARNING IN LATER LIFE

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1 Introduction

There is a broad consensus in industrial countries that continuing participation in learning throughout life is good for economic prosperity and the energy of society as a whole. There is increasing evidence that it is good for your health. Yet the UK remains a sharply divided country where some enjoy the benefits of initial education, receive regular opportunities for training at work, and invest in their own learning. For others, it is a case of 'if at first you don't succeed you won't succeed': the same people who benefited least at school find themselves excluded from training at work and rarely take up opportunities in later life, investing little in their own learning.

Growing older for some people can bring about exclusion – from work, from family and society and from a sense of purpose. For those who have become marginalised, through poverty, poor health, poor housing, or through racial or other discrimination, the lack of opportunity to learn new things compounds their disadvantages in dealing with a changing world. Lack of activity, both physical and intellectual is likely to accelerate their ageing. Those who have had a poor experience of initial education are already at a disadvantage anyway. This paper argues for more and better learning opportunities for older people, as a matter of urgency and equity.

There is a strong case for increasing public investment in order to widen participation in learning, targeting particularly those who have had least opportunity and motivation to join in. This cannot be achieved by doing more of the same, but needs more and better means of providing education and training programmes, in ways that draw in new and different learners: those who have not benefited since school; those who are disadvantaged by poverty or frailty; and those who are isolated from learning by class barriers.

In order to activate individuals and their communities, we need partnerships that can ensure more effective local delivery. We need to open up the confines of vocational education for narrowly instrumental purposes, and acknowledge, finally, the power and value of informal learning, people developing their own interests and chosen areas of study which can lead to new directions for their personal development. This is relevant especially for older people, who most crucially need to sustain active and independent lives, but who are less well served by the system than younger generations. Older people need their voice of experience to be heard, and this paper sets out to make the case for their better access to learning as an integral element of health and social welfare, for everyone.

A substantial proportion of the UK's population is already middle-aged and older. The over-fifties, the post-war 'baby boomers' and their elders, are articulate members of society, with valuable energy, skills and accumulated experience to offer. As the Prime Minister stated for the launch of the Cabinet Office initiative, the Better Government for Older People Programme, in June 1998:

For too long the interests of older people have not been a high enough priority for government. I want that to change. People are living longer, and enjoying many more years of active life after retirement.

But there is more to take into account than simply fending off boredom after retiring from work. Life continues to be complex and changing, through our fifties, sixties and beyond. There is no longer a specific age at which we should retire from employment, pick up our pension, become a grandparent rather than a parent, give up sports and travel, slow down. The seven ages of (wo)man cannot be defined so tightly nowadays. We are a multiracial, multicultural, mixed faith community, with different mores and expectations. The role of women has changed radically and fast over the past 30 years, as has the socio-economic environment overall. There is a dangerous gap between the affluent and engaged on the one hand, and the poor, potentially aggrieved, on the other.

Active participation in learning, on a lifelong basis for all, is essential to maintaining active, independent, healthy lives, and older people need access to the whole range of opportunities. Informal learning, for interest, to open up new directions for development, for the achievement of new skills, for citizenship and for fun, is as important as formal structured learning. For all of us, younger and older, lifelong opportunities to learn should build our experience and confidence, encourage us to learn by doing and to give our energies and expertise back to the community in a variety of roles. Common sense tells us that learning new things prolongs active life, for the benefit of everyone concerned.

Older learners, at whatever age, are not a single, uniform group, but continue to be different in their individual purposes and aspirations. Some older women are less likely to have benefited from education and training in their younger lives. Elders from our black and ethnic minority communities have borne the brunt of discrimination in their earlier years, and continue to encounter lack of understanding about their original cultures. People with learning difficulties and/or disabilities suffer more in older age. For all, however, age discrimination obstructs their full participation in learning, and in society generally. For the past 30 years or so, the focus has been on the younger generation, and older people are seen as obsolete, past their sell-by date, and an economic burden to be borne. They have been the first to be made redundant from paid work, to be excluded from education and training, and their longevity due to better health is seen as a problem rather than a success to be celebrated. Significantly, a British Gas-funded survey in 1991 revealed that ageist attitudes seem to derive less from young people, than from those in mid-career and mid-life, perhaps fearful of their own mortality. And yet, it is now evident and acknowledged that the loss of accumulated skills and experience has been premature, that we all need to sustain economic independence into much older age, and to adapt to change throughout the whole of our lives, including our eldest years.

Older people represent a rich resource, and this is beginning to be recognised by governments world-wide. In Japan, the United States of America and Australia as well as in the United Kingdom their potential is being re-examined. In most countries, the proportion of older people will increase over the next 30 years as a consequence of better health – in infancy and later life – longer lives, and lower birth rates. It is important, therefore, that policies and strategies are adopted which encourage their continued involvement in all aspects of society. We must take this opportunity to plan services and legislation to make best use of their experience of work, life and family. In order to do so, we need to revive their self-esteem and reduce their view of being on life's scrap heap.

In the United Kingdom, there is already a much greater focus on valuing older people. In 1993, the European Year of Older People and Solidarity Between Generations did much to raise their profile and generate new approaches. There is a growing range of work initiated by and for older people, aiming to disprove the myths and stereotypes which still pervade much of our thinking and assumptions about growing old. Education and training programmes must be integral to such developments, and lifelong learning opportunities need co-operation and collaboration at all levels – national and local – to energise change. But service planning is incoherent and provision fragmented. Funding and other resources are insufficient to provide adequate provision of education. Much of what happens is due to local effort: an enlightened local authority or education provider, a determined individual older or otherwise. The Government has published a Green

Paper *The Learning Age: A Renaissance for a New Britain* stating its intention to invest in learning to benefit everyone, and initiated developments which could lead to real lifelong learning provision, but it is less clear about how it will reach older learners.

The focus for NIACE's work in this area is our Older & Bolder initiative, which started in 1995 jointly funded by the Esmée Fairbairn Charitable Trust and the Carnegie (UK) Trust Ltd as part of its continuing Third Age programme. Although NIACE's formal remit is for England and Wales, we are fortunate to have friendly relationships with colleagues in Scotland and Northern Ireland, and to share experience with them.

Older & Bolder encompasses older learners from the age of 50, to include the continuum of work and retirement, intergenerational families, and changing roles, as well as creating a wider frame for data gathering for future tracking. Older & Bolder also promotes the development of wider participation by older learners, in more and better learning programmes. It promotes also the targeting of support to those who are currently excluded, or disadvantaged in gaining access to education and training.

It is more convenient to use the term older learners than 'Third Age'. In 1992 the Carnegie Third Age Inquiry categorised the Third Age solely for statistical purposes as age 50 to 74. As Carnegie and others have emphasised, the term Third Age is a stage of life, post-work and post-family, not usefully definable by chronological age. Equally, the term 'Fourth Age' is sometimes used to define a time of increasing frailty, and dependence on others, but this does not apply exclusively to an older age group, or to all older people. So boundaries blur; in planning better opportunities for people aged 50 and over, inevitably this will benefit others in the longer term, and other excluded groups of people for different reasons.

This policy paper aims to be a positive contribution to a debate developed over a long period, to generate active consideration of means of improving provision and widening participation by older adults. It draws on demographic arguments and evidence of older peoples' disengagement from many aspects of social, community and economic life. Although the governance and delivery of learning varies across the UK, the demographic priorities are equally applicable in Wales, Scotland and Northern Ireland, where a more robust tradition of community education can provide responsive practice. Of equal importance are the testimonies of people themselves to the benefits of learning in later life. The paper deals mainly with the wider range of learning provision, and does not attempt to describe and analyse directly learning for employment, or in the workplace, where we know older workers are at a disadvantage. The Employers Forum on Age, established in 1995, has embarked on useful work to examine and inform employers' practice in relation to different age ranges of employees. Clearly, this is an area where more research work could and should be done.

This paper is aimed at those who are involved in making social policy, those who fund education and other public benefits, those who provide learning opportunities, those agencies which support older people specifically, and older people themselves. From the evidence – statistical and anecdotal – a series of recommendations is made covering a wide spectrum of decision makers and practitioners, all those who in some way impinge upon the quality of life of older people. With its recommendations, it is based on principles of social equity. However, the paper is pragmatic also, in seeking to maximise the resource potential of older people and to minimise the risk of a dependent disengaged older population at a time when the patterns of work, family, health, welfare and pension funding are changing or being re-examined.

Key points

- Learning throughout life is integral to active, healthy and independent living for all.
- We need wider participation in more and better learning opportunities to include those who have not benefited previously and/or who are excluded currently.

- The whole range of learning programmes must be accessible, both informal and formal programmes being equally valued.
- Older people, arbitrarily defined as aged 50 and over, have an equal entitlement to access to learning, but age discrimination prevents this.
- Older people are not a uniform group, but are as varied in their interests, purposes and choices as younger.
- There is a strong case for public investment in learning provision for older people needing additional resources.

2 What learning means to older people

Characteristically, adults return to learn with clarity of purpose and high motivation about their choice of subject. Their own experience takes them in particular directions and they gain confidence about their own views and values. They appreciate learning for its own sake, with the excitement of the new directions it opens up, the satisfaction of curiosity and creativity, and the sociable enjoyment of group activities. They give articulate accounts of the benefits learning brings, and the transformation of their lives. Their own vivid testimonies make the best case for learning in later life.

The return to learn course gave me the confidence to study again. It is a great stimulus for me, mentally and physically. I enjoy meeting people of all age groups. I am learning the things I want to learn and not because I have to.

(Theresa Ang-Kieu Shu, age 62, Newbury)

When Joy attended an Assertiveness course at Strode College she was coping with loss of family income following her husband's redundancy, having to care for an elderly mother (including twice-weekly shopping trips), her own illness and addiction to tranquillisers. The latter produced withdrawal symptoms – disturbed sleep patterns, stress, panic attacks, lack of self-esteem and some agoraphobia. She has now overcome years of tranquilliser addiction, she has rebuilt her confidence with a personal development programme and done invaluable work for the Centre.

I have become a valued person, to myself, my family, my friends and the Self Help Centre so that I can now give valuable skills and time to others in the community. Through support, encouragement and attending courses, I have developed and grown so that I feel completely different now. Adult learning has given me a purpose and new meaning to life.

(Joy Brown, age 61, Street)

As a person who became blind late in life it would have been so easy to give up and just stay at home feeling sorry for myself. Following this course has brought me into contact with other students of all ages, it has given me an outside interest and has helped keep my mind active. Being computer literate is a necessary qualification these days and despite my disability I feel I am part of today's computer literate society and intend to use the skills I have learned to help others and to prove to others that they should not let a disability stand in the way of their dreams.

(Bhupendra Patel, age 55, Milton Keynes)

Says David Standfast (age 61, Streatham): 'The benefits of adult education art classes are incalculable. My drawing and painting have matured. I can learn from others and the discipline of attending classes acts as a spur.' David's biggest difficulty has been cut-backs in adult education, which means a narrower choice of classes and sometimes having to travel further. 'I am very apprehensive about the future of adult education', he adds, acknowledging that it has been a lifeline, helping him to overcome severe bouts of depression following redundancy at work.

This is the first chance in my life to study. For me education is special. It is important to know what is happening in the world. Without education there is no prospect in life and life would be blind.

(Stoja Novakovic, age 56, Newcastle under Lyme)

The benefits [of learning] have been to feel really alive mentally and physically, through exerting the self-discipline to fulfil the course requirements, to get up and go, to read, to write, to question with increasing awareness. It takes the mundanity out of the essential household chores. The stimulation is better than drugs I'm sure – more effective than alcohol of which I'm not keen and more enduring than sex!

'Tis said I have become more argumentative – I think I have become more confident.

(Rosemary Marriott, age 63, Kings Lynn)

Learning has given me confidence and independence. I feel valued and proud of what I have achieved. With the skills I've developed I can really have a go helping my community.

(Ann Williams, age 53, Salford)

As I live on my own I need to learn English in order to deal with the household administration. Since I have joined the classes I have overcome my mental block and become more confident in communicating in the English language.

(Lalita Patel, age 73, Wolverhampton)

I treat my further education as a job. After years of illness, it makes me feel like a citizen again. Winning the Coventry poetry competition, coming runner-up in the short story competition, and being highly commended for a journalistic report entered in a national competition, have been achievements beyond my wildest dreams. Learning has given me dignity and self-assurance.

When you're feeling ill, time hangs heavily on you. Now, my time has become entirely filled by studying and writing. The courses have changed my life completely and given me something to work for.

(Sean Fagan, age 63, Coventry)

Academic courses have broadened my mind, leisure courses extend my interests, and physical courses have helped me keep as fit as possible.

(Daphne Richardson, age 71, Littlehampton)

I have gained confidence in talking English and I now know that my Spanish accent is not a hindrance. Going into schools gives me the opportunity to meet younger people and talk to them and keeps me young in mind and spirit. It is good to be able to use the skills you have and to pass on the knowledge that you have built up through life's experience.

(Cai Martinez, age 75, London)

Cynthia Brown (age 73, Tewkesbury) has been an inspiration to others by her great enthusiasm, hard work and lively approach. Since the age of 67 she has achieved a commendable transformation into a lecturer and writer, having joined the Tewkesbury University of the Third Age local history group three and a half years ago. She had so much to offer that she has since become a joint tutor. As well as this, she initiated a project about the changes in the town in the past 50 years, and persuaded others to produce good work on this. She organised members of the group to perform a presentation of selected writings of John Moore.

In order to achieve all this Cynthia has had to overcome enormous difficulties. Her husband is confined to a wheelchair, and until December 1996 she was also looking after her 100 year old mother. She herself has had a knee replacement.

Christine (age 82, Seddon Heaton), who suffers from very bad arthritis, has taken courses in

philosophy, history, science, politics, music and many more. On being asked why she has participated in learning, she replied: 'because with any luck we can learn all our lives – understanding or learning about something immediately opens the door to finding out more and more. I leave classes feeling that my brain has been stimulated by hearing about different ideas and by discussions with other students.'

I am glad to discover I have abilities and potential which hitherto had not been tapped. The results of my works have increased my confidence following retirement.

(Victoria Adejobi, age 62, London)

[My learning has given me] a great deal of pleasure – because of the skills that I have acquired, I have been able to move into employment, and not only that, but employment I enjoy. It has given me the confidence to speak in any company, and to teach courses which only a few years ago I would never have had the nerve to be a student on! It has made me feel a much happier and fulfilled person.

(John Gates, age 56, Maesteg)

Almost 40 years after failing her 11-plus examination, Jenny Snelling still suffered from an inferiority complex.

English grammar worried me so much that I developed a phobia. I couldn't put pen to paper. But my thirst for knowledge drove me on. I got a certificate in childcare, dietetics and hygiene. I worked in Italy and leant Italian. Then the Street Self-Help Centre helped me face up to my problems with writing and spelling. Adult education helped me recognise all the skills I had as home-maker and mother. I got an RSA Certificate in Continuing Education. I did an Access Course and Parent Link, then a GCSE in Psychology, an Advanced Certificate in Counselling and many other courses. I have learnt about politics and psychology, drugs, and history. I can run a successful group in anything I know about, thanks to adult education.

(Jennifer Snelling, age 54, Street)

My experience of re-entering education has been nothing short of life saving. It laid bare wounds that I did not know I carried, it gave me a taste of the humility necessary to reach down and pick myself up, it provided me with the stimulus, the passion, the hunger, the tenacity and the strength to build my life. I will not readily relinquish my hold on salvation.

[Learning has given me] a place at university, a chance to become the writer I always wanted to be, but most of all a life! A life that is overflowing with love, laughter, challenges and purpose. Make no mistake – re-entering education plucked me out of despair and gave me wings!

(Mike Carnaby, age 55, Worksop)

It keeps me mentally active, slows down my ageing, I now have the ability to teach my grandchildren and I have the personal satisfaction 'that I am with the time'.

(Nageswara N'Rao, age 71, Croydon)

An unexpected benefit is I have been accepted by all of my fellow students despite the great age differences. No concessions or allowances made, and therefore been quite unaware of my advanced years whilst in college. Truly, it is helping me to think and stay young!

(Gordon Walker, age 66, Canterbury)

Going to university has given me confidence and raised my self esteem. The opportunity to study came at a time when I was very low physically and mentally and had suffered a personal tragedy. I had also to give up a job I enjoyed and this new experience gave me a new purpose in life.

(Shiela Todd, age 67, South Shields)

I feel more confident and am able to discuss maths problems with my daughter. I think my family are beginning to realise I do have a brain.

(May Smither, age 68, Romford)

It has given me an interest in life, and a distraction from severe health problems and constant pain. It has also given me a great sense of achievement which has increased self-esteem. For much of my life I have believed myself to be no use at anything, especially after I lost my sight.

(Elsa Spalding, age 87, Harrogate)

Whilst studying I developed cancer and underwent a mastectomy I also had two eye operations but studying for my degree helped me cope. I was determined to overcome anything. Nothing was going to stop me getting my degree.

(Nora Harris, age 81, Bristol)

Key points

- The circumstances and motivation of older people are as diverse as those of younger generations.
- Informal learning is an essential means of access and participation, building confidence and self-esteem and encouraging new directions.
- Older learners consciously acquire new skills useful to their community, whether in paid work, unpaid volunteer or family support roles.
- Older learners welcome opportunities to share their experiences via intergenerational learning, and through mentoring younger generations.
- Older people value learning as a means of coping with adverse circumstances, social, economic and health-related.

3 The story so far

The case for learning opportunities for older people is not a new one. For more than a generation, NIACE has promoted the need for better attention to their learning needs. Indeed, in consultation with the Nuffield Foundation, NIACE members were among the first to recognise the educational implications of demographic and economic change in the UK, leading to Brian Groombridge undertaking the enquiry published as *Education and Retirement*, in 1960. Since then, the issues around their limited participation have been stated persistently by committed researchers and supporters, as it became evident that people were no longer retiring from active responsibilities to immediate death, but were increasingly living longer, with more time to do other things. But the post-war recovery shifted the focus too far towards youth as hope, and forgot the value of age and experience, so that issues of ageing were given scant attention. Although nearly 20 per cent of the UK population is already over 60 and this proportion will grow to nearly 24 per cent by 2010, currently social policy is inadequate and fragmented in relation to the demographic ageing of the UK population.

Nevertheless the equal needs and rights of older people to learn for their own changing lives were staked out clearly over a long period. In 1980, an international seminar organised jointly by UNESCO with the Universities of London and Keele, and reported by Brian Groombridge in NIACE's journal *Adult Education* in 1982, stated a range of fundamental principles of fair treatment and entitlement to lifelong learning opportunities for older alongside younger generations. The pioneering work of Sidney Jones in developing the Learning in Later Life programme in 1981, at the Polytechnic of North London, provided a model for others to follow. In 1982, Peter Laslett, with Dianne Norton, Eric Midwinter, Michael Young and other activists founded the University of the Third Age (U3A) in the UK. This was followed by Eric Midwinter's book *Age is Opportunity: Education and Older People* published by the Centre for Policy on Ageing (CPA) in 1982, and he has continued to argue their case to the present day, most recently within *The Social Policy of Old Age: Moving into the Twenty-first Century* (1998) edited by Miriam Bernard and Judith Phillips for CPA. In 1982 also, ACACE (the Advisory Council for Adult and Continuing Education) published a range of policy papers emphasising the need for an all-inclusive and coherent adult education system. In 1983, Brian Groombridge, Sally Greengross, Frank Glendenning, Joanna Bornat and other pioneers were signatories to the FREE (Forum for the Rights of Elderly People in Education) manifesto, and later in 1983/4 the Universities Council for Adult Continuing Education (UCACE) focus on older learners led to the creation of the Association for Educational Gerontology in 1985. As long ago as 1984, Age Concern Scotland commissioned a report mapping learning provision for older people.

In 1988, Roger Harrison wrote *Learning Later: a Handbook for Developing Educational Opportunities with Older People* commissioned by the Department for Education and Employment (DfEE) and published by NIACE's Unit for the Development of Adult Continuing Education (UDACE). In 'Good Practice in the Education and Training of Older Adults' published by Arena, in 1994, Alex Withnall and Keith Percy analysed the learning that takes place in a range of voluntary activities undertaken by older adults, as a valuable function with social benefits for all. More recently, the National Centre for Volunteering under the aegis of the continuing work of the

Carnegie Third Age Programme has carried out further research and development work on the roles, deployment and training of older volunteers.

The Carnegie Inquiry into the Third Age provided a benchmark of research and publication on the social policy issues around older age with a raft of reports published by the Carnegie Trust in 1992. Volume 3: *Learning: Education and Training and Information in the Third Age* written by Tom Schuller and Anne Marie Bostyn of the University of Edinburgh, identified not only a low level of participation in all forms of formal and informal learning, but also a range of barriers preventing older learners' access, contrasted with the likely growing demand from the post-war generation for providing more and better learning opportunities, as well as the social and economic reasons for doing so. They worried that provision for older learners would become increasingly fragmented, particularly in Further and Higher Education, just when it is becoming even more important to sustain and develop older learners' active engagement.

Surprisingly, given they are a growing market, older people are awarded a low priority in access to education. The current low level of participation of older people in learning programmes perpetuates a long-standing inequity with fewer than 1 in 5 of the over-65 age group involved in current or recent learning, as measured by NIACE's survey of participation in 1996. Many older learners are truly among the socially excluded, especially when you take into account the compound factors such as class, previous educational experience, the adverse effect of finishing initial education before the age of 16, particularly for older women, and the double-disadvantage for those who are disabled or frail. For those who come from a different cultural or linguistic background, there is also the exclusion of racial discrimination, whether direct or indirect. As with all age-groups, among those who do participate in learning programmes there is a predominance of the affluent and already well-educated middle classes, eager for more.

Recognising that older people are not a uniform group in their needs, purposes and choices, NIACE's Older & Bolder initiative chooses consciously to promote learning opportunities for those aged 50+, to recognise the spectrum of people's lives with work continuing to be significant, even in the face of redundancy, early retirement, or transition to short term, part-time, portfolio working. It also recognises that the extended family still lives, albeit in different forms of overlapping relationships and age groups, through first and second tiers of child-rearing, younger active grandparents, communications no longer dependent on geographical proximity, and all leading to a more fluid definition of kith and kin. At the same time, Older & Bolder also encompasses the age range beyond 75, when physical frailty and the increasing need for care support have to be taken into account.

One of the greatest achievements of the twentieth century has been the extension of life expectancy, by better hygiene and health care delaying the onset of morbidity. Older age has become a positive, active phase of life offering new opportunities and developments both for individuals and for society as a whole. Older people have substantial reserves of valuable time and experience to offer to younger generations. While we must face the reality of transitions, retirement from employment, from family and domestic responsibilities, towards active older age, or less mobile physical frailty, we are better equipped in knowledge and technology to support this. However, paradoxically, the focus of education and training provision has been mainly on the young, and has been accompanied by what amounts to a denial of the real need for learning to be for a longer lifetime.

It is not surprising, therefore, that there are some generalisations which apply similarly to both older and younger people's learning, and the contrast is in the few but significant differences. There are many purposes of learning programmes common to both younger and older adults, whether for:

- personal fulfilment, to lead active, independent lives;
- social life to combat isolation and develop confidence;

- development of existing or new skills;
- training for work, whether paid employment, self-employment, intermittent commissions or unpaid volunteer roles;
- development of caring skills, for family support or for work;
- health, both physical and mental, preventative as well as remedial;
- dealing with finances, officialdom and bureaucracy;
- civics and citizenship, including voluntary work;
- interests and enjoyment, to fulfil curiosity and personal development.

This agenda of empowerment is important for everyone, at all ages and life circumstances. However, there are some additional factors associated with being old, and of benefit or concern to the community, such as:

- the value of older people's experience, to be offered to younger generations, whether as reminiscence, archive or as mentors or researchers;
- the need to give older people a voice, to include them directly in care planning and education provision for older age, and to take their views into account;
- their continuing contributions to the community, as well as when younger, via work, taxes, 'the war effort' etc., when there are few benefits available in return;
- the incidence of frailty and disability with increasing age;
- ageism in society generally, as well as in education provision and employment particularly.

We cannot afford to waste the resource and the potential of older generations. We need to take into account, therefore, the different ways adults learn, building on their experience and maturity. Gunther Dohman of Deutsches Volkshochschul Verbandes, the German Institute for Adult Education, in his paper to the OECD Conference on 'How Adults Learn' in Washington DC, USA in 1998, elaborated the role and values of older learners. They want to choose purposeful learning which builds on their own experience, takes them in new directions of their own choosing and relates to their existing interests and motivation. They prefer open, informal and self-directed learning, welcoming the opportunity to debate with others, both teachers and learners, in study groups. They are strongly motivated towards learning for its own sake, and understand progression to be not just towards qualification as an end in itself, but more towards advanced levels of knowledge and research, opening up new horizons. At the same time they value useful skills, in information acquisition and technology, languages, the arts and crafts. Older learners understand the fluid relationship between experiential, informal and formal learning, and the added value to be obtained in this way.

Both older and younger generations, however, face the same barriers to learning, such as:

- lack of adequate and accessible advice and guidance on possible choices;
- lack of confidence about study skills, and fear of failure;
- a curriculum which does not relate to and build on their purposes and experience, inhibiting choice of different levels of study;
- the time required, whether length of course, full-time rather than part-time mode, inflexibility of time-tabling without options of daytime or evening attendance;
- location and distance, when transport is difficult and costly;
- limited physical access in response to disability and frailty;
- funding versus costs, especially when individuals' private resources are small and

often fixed income, while support for older learners is inadequate and costs of programmes are increasing;

- personal or peer-group attitudes about returning to learning, particularly when early experiences of school education have not been good.

For older learners there are also some attitudinal barriers all their own. For example, there is evidence that while all age groups believe that education is a good thing, of value to both the individual and the community, the over-55s tend to think they are too old to learn (Campaign for Learning MORI poll, 1996). There is a justified view among those who have not achieved highly in initial education, and who have not been encouraged to believe that they are entitled to learn later in life, that 'education's for other people'. This is particularly so for those who are categorised working class, broadly in social classes C2, D and E, and for those who have worked in low-skill, low-pay, low-status jobs without training or re-training opportunities. Some older women, conditioned by family and domestic responsibilities lack self-esteem and continue to believe that they should sacrifice their interests to their families or the younger generation in general. Others may be alone and lonely, lacking the confidence to take up new interests and friends outside the home. Some older people from black and other ethnic minority communities are inhibited especially by lack of English language skills, and by different cultural expectations, despite often having advanced skills, qualifications and experience from their earlier lives. Older people with learning difficulties and disabilities, and those who have become disabled through ill-health, have little opportunity to access learning programmes which offer them choice and development. Even in response to the loss of hearing and vision normally associated with ageing, there is little real support via such simple technical aids as induction loops for those who are deaf or hard of hearing, or large print text for those who are visually impaired.

At the same time, those who are already disadvantaged in some way are more likely to fall into the poverty trap: they have had less opportunity to earn; to build pension rights, and often have less access to welfare benefits. Those who are poor, living in poorer housing and with meagre diets, are less likely to retain good health and physical strength in older age. They are unlikely to have spare money to spend on learning programmes. They are among the most vulnerable, and most in need of support.

The development of education provision in the main has not supported older people's learning, being restricted particularly as a consequence of the Further and Higher Education Act 1992, and its effects on the resourcing of provision. Of course there are some fine examples of good quality, targeted and fulfilling programmes of both formal and informal learning, across all sectors of education and training. In general, however, there is a skew of participation among:

- LEA-provided adult education services are chosen by a large proportion of older learners, across formal qualification-bearing as well as informal programmes; however, under pressure of reduced resources directed towards schools as a first priority, the curriculum range has narrowed, progression routes into Further Education and Higher Education are minimal, course fees have increased, fee remissions for the over 60s decreased, and provision cannot be said to be either secure or adequate;
- Further Education Colleges which increasingly attract older learners as well as their original 16- to 19-year-old cohort, now enrol 118,900 students over the age of 60; however, while there was a dramatic increase in total enrolments, by 29 per cent between 1992/93 and 1996/97 the same proportional increase has not been achieved for older learners; also, between 1995-6 and 1996-7 total enrolments dropped by almost 3 per cent but for people over age 60 the decrease was almost 11 per cent;
- Higher Education, where many of the traditional Extra Mural Departments offering short courses in informal adult education have either disappeared, or changed their focus, even taking into account the 'new' universities with their broader age profile; recent data from the Society for Research into Higher Education (SRHE) and the

Higher Education Statistical Agency (HESA) indicates that the overall proportion of mature students aged 50+ in 1996 on full time courses was 0.5 per cent and on part time courses 12.6 per cent; the honourable exception is the Open University, with over-50s as 17 per cent of its total student numbers reflecting its agenda of equal opportunities, encouragement of a second chance to learn and the user-friendly mode of distance learning;

- training for skills has tended to focus on younger people, whether provided by employers, other training agencies, or Training and Enterprise Councils; age discrimination in employment is well-evidenced, and like gender discrimination locks people into low-pay and low-prospects work; however, the Government's determination to combat age and other forms of discrimination in the workplace, and especially the extension of the New Deal to support the long-term unemployed over the age of 25 into work, should improve access to training for older workers, whether for paid employment or in volunteer roles;
- voluntary organisations providing education and training, such as the Workers Educational Association (WEA), National Federation of Women's Institutes (NFWI), Age Concern and other special interest groups have a good track-record of encouraging and supporting older learners with good quality programmes, many of them accredited; the huge growth of the U3A in the UK to over 75,000 learners in 370 local U3A groups since 1982 demonstrates the demand for learning; however, voluntary providers have extremely limited resources (money, staff, space) lack direct connection to mainstream education curricula, and for some there is almost an imbalance of older people without the stimulus of younger adults joining in to form and refresh intergenerational groups.

The national targets for education and training, originally set in 1991, and revised downwards for 1995-98, have proved difficult to meet. They are expressed mainly in terms of training young people and the workforce, with little reference to broader learning for all, and no explicit reference to older adults. To increase the national pool of talent and effect change rapidly, the real need for lifelong learning opportunities must be recognised, with positive action across the whole age range. We cannot wait for the younger generation to grow its knowledge and experience.

NIACE, focusing on its Older & Bolder initiative, responded directly to the Department for Education and Employment's Green Paper on lifelong learning *The Learning Age* which states government's intention to invest in learning to benefit everyone. Along with other recent Government initiatives around education provision and support structures, the Green Paper offers some hope of improvement in the longer term (although there is little explicit reference to older learners). The emphasis on removing barriers to participation in lifelong learning, for everyone, with more localised provision of wider learning opportunities, opens up possibilities of wider participation and more accessible and user-friendly venues such as community and care centres, libraries, health centres, village halls etc. The encouragement to form provider-partnerships including not only local authorities, schools, colleges and universities, but also voluntary and community groups, should provide a stronger voice for the people they serve. There is a stronger focus on the responsiveness and therefore assessment of adequacy of local authority services, with more emphasis on cross-service working. The Better Government for Older People programme, established by the Cabinet Office, will provide a structure and models to focus the planning and delivery of support services to older people in the community.

The Royal Commission on Long Term Care for the Elderly, established in 1997 and reporting in 1998/99, defined an important set of values for its work, including the integral role of learning:

Old age represents an opportunity – for intellectual fulfilment and for the achievement of ambitions put on hold during working lives. Society – those who are involved in government, or who provide and develop products and services, should consider the access for old people to leisure, education and the tools that enable people to enjoy these.

Now we need to make lifelong learning a reality for older people, and to ensure that it can be sustained for succeeding generations of adult learners. After all, one measure of a civilised society is the way it treats its elders.

Key points

- Older people have not been treated equitably within social policies, and this has been evident for a long time.
- They have fewer opportunities to participate in education and training, and encounter more barriers to learning as they become older.
- The learning needs of older people are as important as those of younger generations, to maintain full and independent lives.
- It is often assumed that they have lesser abilities and aspirations in learning, belied by their actual performance.
- There is now an opportunity to develop consistent and different social policies to remedy their exclusion, and to build more and different lifelong learning provision, to benefit older people as well as younger.

4 Demography: an ageing population

Europe is ageing. The evidence shows that over the next 30 years our society will become older, with many more women than men, with variations in ageing across the wide range of ethnic groups, and with differing implications depending on health, wealth and educational background. This greying results from improved affluence, social and health care, with significant drops in the birth rate coupled with improved life expectancy over the last 100 years.

The impact for society will be felt in the workplace, through the decrease in the proportion of the population which is economically active; in the costs of health and welfare for those trapped by poverty with insufficient pension funds; and in the social environment of learning and leisure, which enable active, independent living, to counter isolation and dependency. In a society striving to develop a culture of lifelong learning, therefore, there must be a clear view of what the education and training sectors must offer old and young alike as society changes.

As with all age groups, there is a diversity of changing life circumstances for which people will want to continue learning throughout their lives, even in their eldest years. We cannot predict what our individual and collective needs and demands will be for a total life span, but we can at least look at the ageing profile of the UK's population over time and measure that against the adequacy or otherwise of learning provision now, in order to improve planning.

Here we illustrate some different dimensions of population change, and there are further detailed statistics in Appendix 1.

- The Carnegie Third Age Inquiry forecast in 1992 that the percentage of the UK population over the age of 50 would increase from 28 per cent in 1951 to 33 per cent in 2001, peaking at 38 per cent in 2021.
- At the same time Dooghe predicted, in the study *The Ageing of the Population in Europe*, that during the period 1950 to 2025, the proportion of the UK population over 60 years of age will increase from 15.5 per cent to 26.8 per cent and that the rate of increase of this age-group is expected to be 33 per cent, while overall the general population will increase by 5.9 per cent.
- National Population Projections in 1994 identified that between 1996 and 2011, the proportion of those over 75 years will increase by 7.7 per cent, and those over 85 by 18.8 per cent. At the same time, the proportion of younger people in the overall population is declining, from about 30 per cent in 1981, to about 24 per cent in 1996, projected to be about 21 per cent in 2023.

In 1997, the Anchor Trust commissioned a survey of older householders in England (excluding those in long-term nursing or residential care), giving a snapshot of the way it was then.

A profile of older householders in England

A Mori Survey (1997) for Anchor Trust of people age 55 and over in England found that:

- 67 per cent classified themselves as retired; 16 per cent were in full time work, 6 per cent part time; 4 per cent unemployed and 1 per cent self-employed. Most of those in employment were under age 65;
- 37 per cent lived alone and 55 per cent with one other person;
- 75 per cent owned their own homes, 18 per cent rented from a local authority, 4 per cent from a housing association and 3 per cent from a private landlord;
- 57 per cent of respondents aged 55 and over had a household income of less than £150 per week. Only 12 per cent had an income in excess of £300 per week;
- there was an approximate 3-way split between older households with no savings, savings under £8000 and savings above this level. The proportion with savings £16000 or more declined from 30 per cent for the 55-64 age group to 19 per cent for those age 75 and over;
- almost 50 per cent of the older households contained one or more people who had a long term illness, health problem or disability which limits daily activity or capacity to work;
- 17 per cent provided family care to others, including 9 per cent for a sick or disabled partner, 6 per cent another elderly relative and 2 per cent for other relatives;
- 84 per cent agreed that older people should stand up more actively for their rights;
- losing physical health (45 per cent); independence (31 per cent); and mental health (18 per cent) were the main concerns of older people about growing old.

Economic activity

Economic calculations are often based on a dependency ratio – the number of people of 'active' age 15 to 59 required to support those aged 60 and over classed for statistical purposes as economically inactive or dependent. In 1950, 100 younger people were required to support 21 of their elders, estimated to rise to 33 by the year 2000 and 48 by 2025.

Table 4.1 *UK economically active population estimates*

	Males %	Females %
In 1984 of the total age group:		
45-59	90	63.3
60-64	57.5	21.8
65 and over	8.7	3.1
All ages 16 and over	75.9	49.2
By 2001 this is expected to be:		
45-59	85.3	71.9
60-64	49.7	29
65 and over	6.8	2.8
All ages 16 and over	70	55

This reduction in the employment of older men contrasted with the increased engagement of older women reflects the loss of jobs and redundancies in the changing labour market. There is no longer a male-oriented heavy manufacturing industrial sector requiring un-skilled or low skilled manual work. The expansion of jobs has been in the service industries, requiring dextrous skills in information processing, human caring skills, or at the low-skilled end, in cleaning, catering and retail. At both ends of the skill spectrum, these jobs are seen as 'women's work'. Too often they are associated with low pay, low prospects and little access to work-related education and training on the one hand, and temporary, short-term or part-time work on the other.

In the continuing work-ethic culture, changes in employment have carried the stigma of failure: men unemployed from their middle years, replaced by women's work at low pay, has devalued their contribution to society as a whole. In addition, from an economic point of view, the shrinking workforce does not seem to generate sufficient resources to sustain substantial increases in public expenditure on welfare.

For some the disengagement from 'working' life comes with a financial package which can sustain life in later years, but for many that is not the case. For those without independent finances there is a need to return to some form of paid employment (Humbly Grove TEC revealed that the vast majority of unemployed people over age 50 are still actively seeking work; in Wales, NIACE Cymru is involved in the Carnegie Third Age project, looking at prospects of older workers in the Rhondda Valley). Yet the change in work patterns and skill requirements coupled with employers' prejudices prevents older people from securing jobs in the labour market.

Disrupted employment, or long periods of unemployment affect earnings, and therefore pensions, thereby reinforcing poverty. The proportion of long-term unemployed people over the age of 50 is still considerable. The long-term unemployment rate shows a preponderance of older workers. For example, 38 per cent of those unemployed aged 50+ have been so for 1 year or longer compared to 27 per cent of all ages in this category; at 2 years+ unemployment, the proportion for the 50+ age group is 26 per cent compared with 15 per cent in the all-age category. The process of registering as unemployed acts in itself as a barrier to re-engagement in so far as for those over the age of 60, there is no need to actively do anything at all. Others register as unfit for work because of the significant increase in stress and depression related illnesses affecting older adults no longer in paid work. There is evidence that unemployment does have an adverse effect on longevity.

About 5 per cent of those aged 45 to 69 believe they have encountered age discrimination when applying for jobs. Given the persistently high rate of unemployment among this age group, the Government has recognised the need to find means of redressing discriminatory practices in employment. A voluntary code of practice, including measures such as the removal of upper age limits in job advertisements, will be published early in 1999. From the National Adult Learning Survey, out in 1997, it was clear that people aged 50 to 59 were half as likely as those aged 20 to 39 to have undertaken taught learning connected with their current job. Currently, there are New Deal pilots developing innovative ways of supporting the 300,000 unemployed over 50s into jobs, offering education, training and financial support to do so. However, the New Deal applies only to those registered for unemployment benefit purposes, and does not address the much larger number of economically inactive over-50s, who might wish to find work.

The expression of 'dependency' by the over-60s mitigates against older people being seen as active contributors to society, simply because age 60 is historically the age considered for withdrawal from economic life. The present debate about 'affordable' pensions (with a Green Paper due later in 1999) and welfare support in older age will need to take into account the continuing activity of older people, and their many forms of contribution to society both financially and in kind. Most importantly, we cannot afford to waste the talents of the increasing proportion of older people in the population.

Volunteering

Contrary to the accepted view, many people over the age of 50 are less likely to be involved in volunteering, as unpaid work. The 1995 National Survey of Voluntary Activity in the UK showed 7.7 million volunteers over the age of 55 (out of the total of 23 million volunteers) but approximately 10 million over age 55 who are not. An Omnibus survey for Age Concern England as part of the Millennium Debate of the Age 1997 indicated that of those aged 55 to 64, 42 per cent are involved in voluntary work, decreasing to 28 per cent at age 75 or over. Of those who had not considered volunteering a majority of all age groups up to age 54 considered that they would in the future. But from age 55 this decreased to 33 per cent and down to 1 per cent for those age 75 and over. Nevertheless, the number of older people involved in voluntary work is significant, and valuable to society. It provides benefit for others, and at the same time the volunteers not only offer their valuable experience but learn themselves by doing new things. Often they move on to leadership roles in voluntary organisations, from where they can support other older people towards independent and self-determining activity.

Wealth and poverty

There is much research evidence that older people are net 'under-claimers' of state welfare benefits. However, most have expectations of their pension entitlement, whether through private provision, occupational schemes, or by reliance on the state provision. Income from non-state sources varies tremendously across age, gender, ethnicity and social class, and those without personal provision remain dependent on state benefits for income in later life. The value of the basic state pension has fallen over time and is now below means-tested social assistance. Meanwhile, 1.8 million people aged 60 and over (around 15 per cent of all pensioners) are in receipt of income support, and it is estimated that a further 1 million are entitled to social assistance but fail to claim it.

The growing concern about the costs of long term care, and of the state pension scheme, and the government's current review, highlight the issue of older people's continuing need to be economically active and financially independent. In future much will depend on both collective and individual wealth accumulation. At the same time information technology will improve the tracking of individual income, tax and benefit payments and support more flexibility of working patterns. There is a danger, however, that this will suit the affluent and high earning, able to effect choices, but impose an inflexible burden on those on low pay or already caught in the poverty trap.

A recent report by Incomes Data Services (*IDS Pensions Bulletin*, 115, May 1998) suggested that the trend towards early retirement is intensifying rather than diminishing. Their survey, covering 1996/7, examined the ages that 55,000 employees started to draw benefits from over 20 major pension schemes, including public and private – and found that 80 per cent retired before their employer's theoretical retiring age – 70 per cent before age 60 and in some companies most employees retired at or before the age of 54.

There is a movement (because of assumed pension costs) to creating a society where pensions, health and welfare funding are identified as the main responsibility of the individual – not the state, not the employer – with a minimal 'safety net' for the poor.

But there is a lack of clarity in the media that social differentiation is sharper among older people. One of the fastest growing groups of millionaires in the UK is among those age 65+, but this receives more publicity than the information that in 1994/5 51 per cent of pensioner households depended on state benefits for at least 75 per cent of their income and 15 per cent received all their income from state benefits.

Health

There is a strong correlation between age, socio-economic background and health, as stated in the Department of Health's Green Paper *Our Healthier Nation* (1998) – 'Poor people are ill more often and die sooner'. Assumptions are made that an ageing society will be a dependent one, poor in health as well as financially. The increased burden on pensions, welfare and health costs is considered to be insupportable, on the evidence of today's costs. Yet two thirds of older people today are in good health and live independently without requiring support from family or other agencies.

The Carnegie Inquiry report *Health: Abilities and Well-being in the Third Age*, by Grimley-Evans *et al* (1992) did suggest that what constitutes the 'health budget' could usefully be widened to include employment, housing, education and fiscal policy. Yet the Green Paper *Our Healthier Nation* argues 'poor health has complex causes. Some are fixed – ageing for instance . . .' although the Department of Health acknowledges that maintaining a healthy nation is a responsibility shared with local health authorities as well as local authority social and education services, housing, leisure and transport. The Green Paper proposes healthy neighbourhoods focusing on older people and adds (Para. 3.91):

The strategy must give older people a better chance of a healthy retirement. There are particular opportunities to improve the health and well being of older people and they must not be neglected.

Equally, the Health Education Authority focuses on older people's health as one of its priorities, and argues for preventative as opposed to remedial health care. The costs of dependency are too high, and by comparison the costs to achieve independence are less high, but they are a long-term investment and do not give an immediate pay back.

In *Promoting the Health of Older People*, Killoran *et al* (1997), maintain that:

the distinction between 'successful' ageing and normal ageing is well established among gerontologists. Where normal ageing is characterised by increasing ill health and functional loss, successful ageing is characterised by the preservation of functional ability . . . Successful ageing is the avoidance of functional loss, and the maintenance of activity makes an important contribution to this end. This perhaps is most apparent with physical activities and functions, though recent years have also seen considerable research interest in the parallel link between continuing mental activity and the prevention of cognitive or intellectual decline.

The **Royal National Institute for the Blind (RNIB)** Survey of visually impaired adults in the UK as reported in its, as yet, unpublished report (1998) on its Lifelong Learning Project indicated that:

- of the 1 million visually impaired people in the UK, 90 per cent are aged 60 or over;
- 74 per cent of the 60+ age group of adults who are visually impaired finished full-time education at age 14 or under;
- in the 60 to 74 age group 81 per cent, and in the 75+ age group 90 per cent, did not pass any exams at school or college.

Dooghe (1992) suggests that 'general satisfaction with life is correlated with social participation, socio economic conditions and the level of health'. He adds 'education especially during the leisure years enhances mental and physical well-being'.

A recently completed research project by The Medical Research Council at the University of London for Research into Ageing supports the concept that education (and occupation) protects cognitive functions and may delay the onset of Alzheimer's Disease. Support in learning is also crucial to those who are isolated by visual or hearing impairment.

Gender

Women have a longer life-expectancy than men, and already for those aged 80 and over, outnumber them by more than 2:1. Often they are widowed or divorced, and are more likely to live alone, but sometimes they continue to have caring responsibilities for older-age family. They are more likely to be poor as they have foregone paid work and pension entitlement, with at best a disrupted earnings record, or been paid less when in employment. They are less likely to be offered work based training and are promoted less. Women's earnings have reached only 80 per cent of male earnings across almost all occupational categories and 1.4 million women are earning less than the National Minimum Wage, according to the Department of Social Security Report *Women and Social Security* (1998, July). Often having foregone paid work, or higher pay prospects in employment, they have a lower contributions record with the National Insurance scheme, particularly as many women over 50 continue to pay at the lower rate 'married women's stamp' on the assumption of dependency on husbands. For all these reasons, they are unable to build sufficient pension rights independently. They are less likely to have access to occupational pensions, and are more likely to be reliant on the state pension.

At the same time, older women have few opportunities of access to vocational and qualification bearing education, and are more likely to have left school at 16 or under. While they read more than men, and are present in substantial numbers in informal learning programmes, in broad adult education, they are disadvantaged by the lack of routes by which they can move on, and develop more skills for economic independence.

Ethnicity

The proportional increase in the over-60s has not yet reached most of the population of black and ethnic minority groups. By 1996, there were 3 million people of black or other ethnic minority origin in the UK, 5.5 per cent of the total population. Of that population grouping, 5.8 per cent were 60 and over, with 11.7 per cent aged between 45 and 59. Within these broad parameters there were significant differences between the population of Black African and Caribbean origin in the main (7.2 per cent aged 60 and over, 11.3 per cent aged 45 to 59), Indian (7.2 per cent and 16 per cent respectively) and Pakistani/Bangladeshi (4.3 per cent and 9.3 per cent respectively). This compares with the higher proportion of about 21 per cent of the white population aged 60 and over, and about 12 per cent aged 45 to 59 currently. Correspondingly, the black and ethnic minority population as a whole shows a greater proportion of younger age groups, with nearly 33 per cent aged under 16, and about 25 per cent in each of the age groups 16 to 29 and 30 to 44. However, in the next 20 to 40 years the proportion of black and ethnic minority elders will increase tenfold.

It is important to recognise that cultural change is taking place simultaneously within both the mainstream population as a whole, and each different black or ethnic minority group. Therefore, it is necessary to take into account not only the perceptions and attitudes of the white, European majority, but also their impact on the different minority groups. The absence of translators and interpreters for minority languages means that people for whom English is not their first language can miss out on information and support structures. The impact of legislation, social and economic circumstances, and priorities for the allocation of resources may not always be clear. Lack of awareness of religious and cultural differences can lead to misunderstandings of views and

decisions. All these factors impinge especially on the older population, who may have come to the UK, with high expectations, in their later life.

Much of the evidence of racial discrimination is most clearly demonstrated within employment and work-related training. The skills and talents of black people are less readily fostered or recognised, and there is a greater incidence of unemployment, or under-employed people. Similarly, people from black and ethnic minority communities have less opportunity to build pensions, especially women working in notoriously low paid areas, such as nursing or cleaning.

There are also marked social, cultural and economic gender-based differences within the different black and ethnic minority populations, and there will be particular issues around disability, health and family caring roles. For all these reasons, they must be a focus of social and economic planning now.

Conclusions

It is increasingly necessary to explore the costs to society of disengagement and dependency of a significant proportion of the population. Not all the costs can be expressed in financial terms and not all are costs to be borne immediately. In many instances, for example pensions and health costs, the impact will not be felt for 20 to 30 years.

The steady overall increase in life expectancy through the twentieth century shows differences by gender and occupation. In 1901, men's average life expectancy was 45.5 years, compared to women's 49 years. By 1996, this increased to about 74.5 and 80 respectively, and by 2021 the Government Actuary predicts a further increase to about 78 for men, and 83 for women. There is a significant difference also between life expectancy for those in the professional and managerial occupational categories, rising from about 72 in the early 1970s to about 75 in the late 1980s, compared to those in manual un-skilled jobs, much lower at about 68 rising to just over 69 in the same period. At the same time, there is a clear link between unemployment and earlier death, with those seeking work showing an increased mortality rate of about 33 per cent beyond the norm compared to those in work with life expectancy increased by about 20 per cent.

Learning opportunities are crucially important to sustain activity. Given the evidence that re-engagement in learning and other resultant activities in later life does not occur easily or in great numbers, strategies have to be evolved to create opportunities appropriate to need. Broadly, learning programmes need to promote personal development and to utilise as fully as possible the potentially wasted resource represented by older people, as well as helping them to maintain a quality of life which is fulfilling and likely to lengthen independence.

Inequalities have widened in recent years, so that those more deserving of chances to return to learning are those least likely to have sufficient disposable income to do so. But this scenario may change with the baby boomer generation, better educated and trained, and more demanding.

Key points

- If the increasing proportion of older people in the UK population becomes inactive and dependent, this will imply real costs greater than immediate cash payments indicate.
- Active participation in all forms of learning, for their own life choices and purposes, is essential to maintain independence.
- The goal should be to optimise their potential for active independent living, targeting support to those who need it most.
- Those most in need of more and better learning opportunities are poorer, with less reward from work and education in earlier years, and more likely to be dependent on state support to achieve a reasonable quality of life.

5 Older learners' participation

NIACE has been mapping adult participation in formal and informal learning since the 1930s, and has published a sequence of studies in the 1980s and 1990s, overseen by Naomi Sargent as our Honorary Research Fellow. These show consistently that participation in learning declines with age. The most recent study *The Learning Divide* was published in 1997, on the basis of a survey carried out by Gallup in 1996, on a population sample of 4,755. This showed that while more than 2 in 5 of the whole population over the age of 16 were currently learning, or had done so over the previous three years, only 1 in 4 of the 55 to 64 age cohort, 1 in 5 of the 65 to 74, and less than 1 in 7 of people over 75 did so. For the purposes of the survey, learning activities were defined as practising, studying or reading about something, as well as being taught; to develop skills, knowledge, abilities or understanding; whether at home, at work, or in a college, whether full-time, part-time or for a short period, and not necessarily leading to a qualification. Therefore, it included all formal, informal and self-studies, within which people consciously chose to learn something.

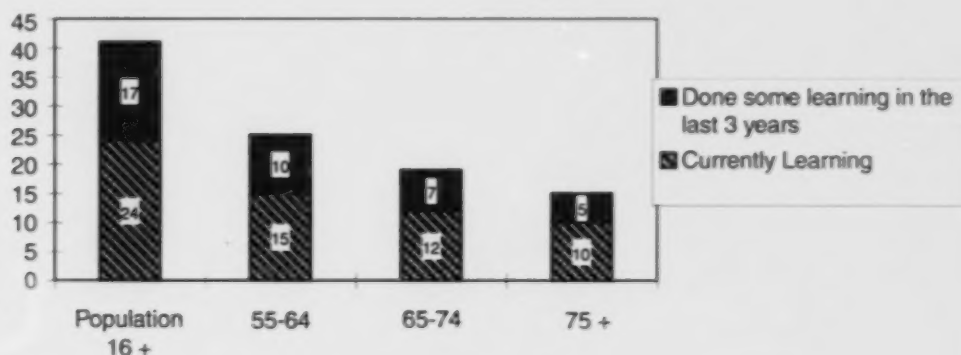


Figure 5.1 Currently/recently doing some learning 1996, %

Source: *The Learning Divide*, Sargent et al, 1997

Another major sequence of participation studies was instigated by the former Manpower Services Commission and its successor agencies, starting with the publication *Training in Britain* (1989). The preparatory studies for *Training in Britain* showed a wide gap between individuals' perceptions and employers' perceptions of how much training and education had happened. Employers reported much higher levels of investment than individuals remembered – perhaps because individuals see a one-day course on a new word-processing package as work rather than learning. These studies have focused on people of labour market age (as do most international studies) although the most recent, *The National Adult Learning Survey* (NALS) published by the Department for Education and Employment (1998) includes adults up to the age of 69. When compared with NIACE's figures, a gap is evident, as NALS reports that 47 per cent of 60- to 69-year-olds have done some kind of learning over the last three years, contrasting with 74 per cent for the whole population, ranging in age from 16 to 69.

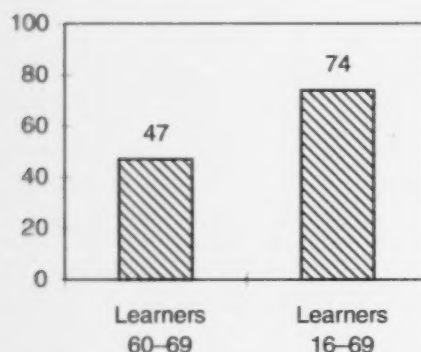


Figure 5.2 Participated in some kind of learning over the last three years
Source: NALS/SCPR Survey 1998

The gap between the NIACE and NALS surveys seems likely to arise from their different methodology. The NIACE surveys use market research opinion polling, asking an omnibus question on participation. The NALS survey is based on hour long interviews – with multiple categories of questions which prompt people to remember short, one-off learning incidents. However, the NIACE data is important in capturing people's sense of themselves as active learners. If people do not remember the learning they have done, they will not internalise confidence in themselves as continuing learners.

Both studies highlight the importance of initial education in affecting later opportunity. The earlier people leave full-time education, the less likely they are to continue learning, as the survey report *The Learning Divide* shows (see Figure 5.3). This pattern impacts strongly on older people particularly, as they are much more likely to have left school before the age of 18.

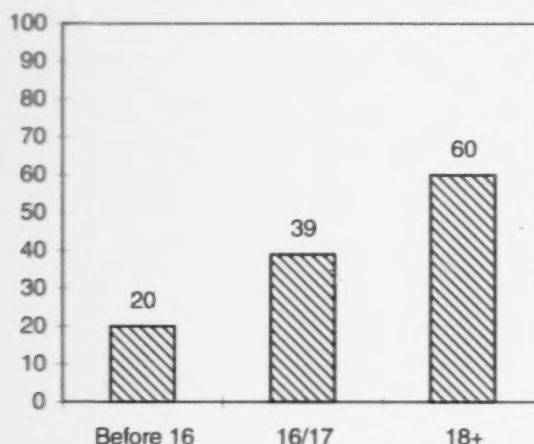


Figure 5.3 Current/recent participation by age of completion of full-time education
Source: *The Learning Divide*, Sargent et al, 1997

For the population as a whole the split between the three groups is roughly even – but older people had fewer opportunities at school. Interestingly, more of those who live to 75 and over had extended education than the 65 to 74 cohort – some indication, perhaps that longevity and educational background are linked. It is the poorest old people in social classes C2, D and E, with less opportunity to study post-school, who are least likely to be actively learning. This contrast is compounded especially for women, with an overall 38 per cent currently or recently involved in learning, compared to 43 per cent men, and 41 per cent of women identifying no learning since leaving full-time education, so that older women's participation is even less. Interestingly, while in line with the population overall, 6 per cent of the sample were black or of other ethnic minority origin,

Table 5.1 Age of completion of full-time education

All 16+ (%)				55-64 (%)				65-74 (%)				75+ (%)			
Base Number		4755		564		603		333							
14 or under	14	}	33	20	}	57	60	}	70	45	}	58			
15	19			37			10			13					
16	26	}	35	15	}	23	12	}	18	13	}	20			
17	9			8			6			7					
18+	32		20		12		20								
Don't know	-		-		-		2								

Source: *The Learning Divide*, Sargant *et al*, 1997

10 per cent of those who said they were still in full-time continuing education came from this minority group, but they are likely to be younger rather than older, and male rather than female.

When asked about the highest level of qualification gained, there were three significant variants affecting older people. Fewer were graduates, more had undertaken apprenticeships, and far more had no qualifications at all. Given the close parallel between formal qualifications gained, and continuing participation, the size of the task in designing learning programmes that succeed in securing older people's participation cannot be underestimated.

Table 5.2 Selected results - highest qualification gained

	All 16+ (%)	55-64 (%)	65-74 (%)	75+ (%)
Base Number	4755	534	603	333
Apprenticeship	3	4	5	8
Degree	8	7	5	5
None	28	43	54	50

Nor is it surprising that having got so far without qualifications few older people now study for them (34 per cent of 55- to-64s, 17 per cent of 65- to-74s, and 45 per cent of 75+ learners were studying for qualifications). Current and recent participation levels are important in themselves, but they also have a major impact on future intentions to learn. The NIACE study asked people 'How likely are you to take up learning in the next three years?' For the whole population the message is stark (see Figure 5.4).

Whilst 39 per cent of the population is overall very or fairly likely to study in the next three years, 72 per cent of current or recent learners expect to study again. In contrast only 13 per cent of those who say they have done no learning since leaving school, expect to study and more than four in five think it unlikely that they will join in. Few older adults aged 55 and over saw much likelihood that they will continue to study.

When those not learning now were asked what, if any, were the main things preventing people from learning the major reasons given for the population as a whole were:

- Not interested/don't want to 28%
- Work/other time pressures 16%
- I feel too old/too ill/disabled 15%
- Cost/money 10%

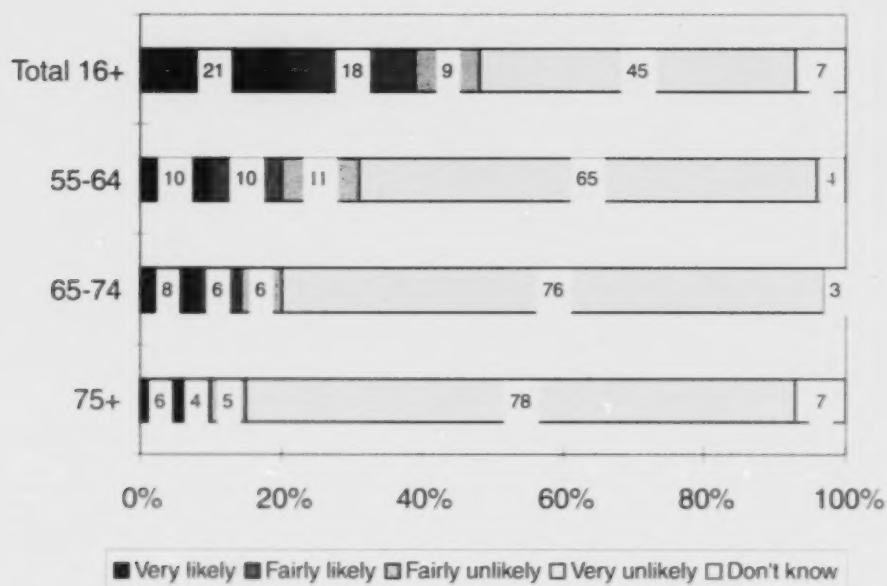


Figure 5.4 Future intentions to take up learning

Childcare responsibilities were a major barrier for 16 per cent of women, but for only 2 per cent of men. For older people two major reasons predominate, and increasingly, as people get older, age is cited as a reason for not studying.

Table 5.3 Major reasons for not studying

	55-64	65-74	75+
Base Number	480	530	299
Not interested/don't want to %	39	40	39
I feel too old/too ill/disabled %	22	37	48

Source: *The Learning Divide*, Sargant *et al*, 1997

Unsurprisingly, work and other time pressures diminished as a reason from 12 per cent for the 55- to-64s, to just 6 per cent for the 75+ cohort. Interestingly, fewer older people were uncertain as to their reasons for non-participation, (11 per cent at 55+, against 20 per cent for all 16+).

There is nothing inevitable about the marginalisation of older people, as the success of the Open University in meeting older people's needs, the growth of Universities of the Third Age, and the commercial prosperity of Saga testify. The Inner London Education Authority offering almost 25 per cent of all LEAs' provision, recruited more than 20 per cent of its post-compulsory students from people of pensionable age. But with the abolition of ILEA, participation rates among older people in its successor boroughs have, in the main, slumped, as rising fees, inter-borough boundaries, and a narrowing curriculum reduced supply. The effects of the 1992 Further and Higher Education Act which targeted academic and vocational courses at the expense of learning for its own sake were immediate and inevitably reduced provision for older learners.

The National Adult Learning Survey offers further evidence that some people have more access to learning opportunities than others. In part, at least, the contrast between the numbers of people

in their sixties learning in the North East as against those living on Merseyside or in the West Midlands must be explained by wide variations in the volume and range of learning provision offered.

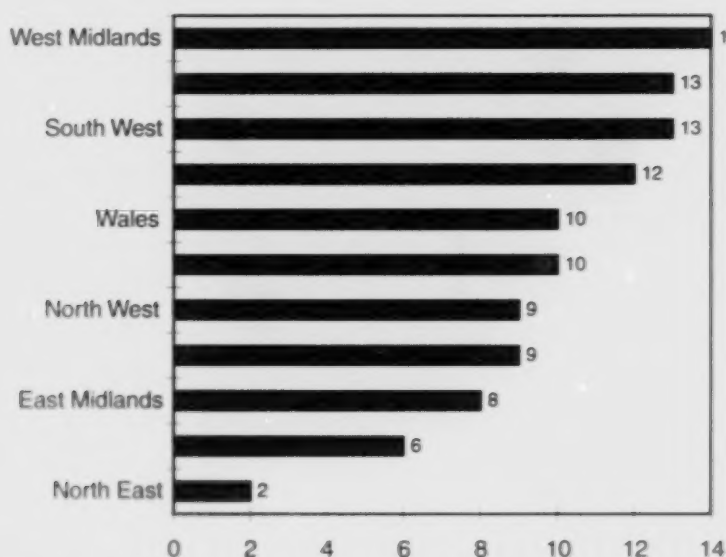


Figure 5.5 People 60 to 69 years of age as a percentage of learners in each region

The NIACE survey asked people what they had been studying, and older people's choices were striking, both in the determination to keep up to date with change evident across all the age cohorts, but also in the changing balance of interests people show as they grow older.

Table 5.4 Most recent choice of study by age

All 16+ (%)		55-64 (%)		65-74 (%)		75+ (%)	
Business/Management	19	Computing	15	Languages	25	Languages	16
Computing	17	Languages	12	Computing	21	Computing	16
Other	11	Other	11	Leisure	13	Business/Management	10
Professional		Vocational				English	10
Other Vocational	9	Leisure	9	History	10	Social Sciences	9
Languages	8	Other	8	Music	10		
		Professional				Leisure	9
Other Academic	7	Business	7			History	8
		Management				Other Academic	8
		History	7				
		Arts and Crafts	7				

Compared with the population at large, there is a richer variety of interests pursued for pleasure in older people's learning, with some indication that those over 75 who are still learning are a small cohort with a continuing interest in how learning can lead to work, whether paid employment or unpaid volunteering.

Guidance

The Learning Divide maps the different sources of advice about adult learning opportunities people use at different stages of their lives. Young people look to schools, colleges and universities as the main source of guidance. People of working age ask for help at the workplace, and in particular from employers and training officers. As people get older, friendship networks, library and communication services become critical.

Table 5.5 *Main sources of advice 55+*

	55-64 (%)	65-74 (%)	75+ (%)
Friends/relatives/workmates	22	22	25
Newspaper adverts	13	10	2
Colleges and adult education centres	9	14	17
Library	6	10	7
Work/employer/training officer	16	7	8
Television	2	5	0
Other	17	21	14

Reasons for learning

NIACE's research has shown a growing vocationalism in education and training, over the last two decades, both in supply, (notably since the 1992 Further and Higher Education Act) and in the reasons learners give for learning. In *The Learning Divide* Naomi Sargent analyses the detailed reasons given into three broad categories:

- work-related reasons;
- personal development issues and;
- education and progression issues.

For all age groups up to 54, work-related reasons dominate, but for older adults it is the pleasure to be gained from the subject studied that is the major declared motivation.

Table 5.6 *Reasons for choosing main subject of learning*

	All 16+ (%)	55-64 (%)	65-74 (%)	75+ (%)
Base Number	1892	143	117	52
All personal development reasons	36	61	80	64
All education/progression reasons	12	2	-	8
All work related reasons	48	30	9	16

For people in the ten years leading up to 65, work remains a significant motivator, as it does for a small band of the oldest age group, but it is the personal development agenda which dominates. The detailed breakdown of personal development reasons is itself interesting. While it is undoubtedly true that community-based learning opportunities help people to make friends, and to keep in touch with the community outside the home, it is interest in the subject – learning for its own sake – that moves older adults.

Interestingly, while 10 per cent of all learners are learning to gain a recognised qualification, only

Table 5.7 *Reasons for choosing subject of main learning*

	All 16+ (%)	55-64 (%)	65-74 (%)	75+ (%)
Base	1892	143	117	52
Interested in the subject	19	37	49	43
To develop myself as a person	9	10	15	8
I enjoy learning and study	6	9	13	13
To meet people	2	5	3	-
	36	61	80	64

Source: *The Learning Divide*, Sargent *et al*, 1997

2 per cent of the 55- to-64s and 5 per cent of the 75+ cohort want qualifications. These findings highlight the reason that changes in public policy have impacted so significantly on older adults, since all the expansion in further and higher education over the last decade has focused on certification and work-related study, while LEA budgets for uncertificated learning have been under severe pressure. However, this may change as later cohorts of learners become more used to assessment and accreditation, appreciating the certification of their achievements.

Places of study

Unsurprisingly, fewer older people learn at work, and more learn at home, through correspondence or at adult education centres, than in the population as a whole. Particularly when there are difficulties of transport, mobility, unsuitable timing or caring responsibilities to surmount, the home or a local community location becomes the most convenient point for access to learning.

Table 5.8 *The main place of learning*

	All 16+ (%)	55-64 (%)	65-74 (%)	75+ (%)
Base Number	1892	143	117	52
University/College of HE/Open University	21	7	11	17
Further education college	20	17	12	17
Where I work	14	11	4	6
At home/informal learning	9	17	26	18
Adult education centre	8	13	16	7
Correspondence course/open learning	4	6	1	5
Community centre	2	2	6	2
At home TV/radio	1	2	3	2

The Campaign for Learning's most recent MORI survey of attitudes to learning showed more broadly and differently that older people's ranking of sources of learning was:

- home/TV 57%
- work 43%
- library 36%
- college/universities 29%
- holidays 22%

This reflects their more localised view of where and how they want to learn.

Length of study

Once older learners develop an interest, they pursue it over time. More than 70 per cent of older learners have been learning their main subject for more than six months. The major proportion have persisted for more than two years. There is a danger, however, that some have become locked into repetitive study, owing to lack of opportunity to move on to advanced levels of their subject, or in other new directions.

Table 5.9 *Length of time spent studying main subject*

	All 16+ (%)	55-64 (%)	65-74 (%)	75+ (%)
Base Number	1968	143	117	52
Less than 1 week	3	1	7	4
1 week - 1 month	5	6	4	4
Over 1 month - 3 months	7	5	5	7
3+ - 6 months	17	15	9	7
7-12 months	11	13	9	7
1+2 years	20	12	12	22
2+ years	35	45	53	47
Don't know	3	3	2	5

More than half spend less than ten hours a week at their studies, but a surprising number spend up to 15 hours a week - suggesting that for an important minority learning becomes a new vocation in retirement. (See Table 5.10)

Table 5.10 *Hours per week spent studying*

	All 16+ (%)	55-64 (%)	65-74 (%)	75+ (%)
Under 5	25	46	38	34
5-9	18	16	21	21
10-14	11	10	19	10
15+	33	16	12	18
Don't know	13	12	11	17

The Learning Divide mapped a range of other issues. Few of the older people dropped out early from courses, and those who did were reluctant to be critical of provision. Public subsidy for older learners is concentrated in fee waivers rather than grants or loans. Few were able to rely on public support to meet fees, but on the other hand almost 50 per cent of them attended courses for which no fee was payable.

Overall the picture is clear. Those older people who are learning are passionate about it. Most will be studying for the sake of the subject - though those in the oldest cohort are more likely to seek external validation. The learning divide that characterises post-school education and training in the UK is at its sharpest among older people. The overwhelming evidence of the NIACE survey is reflected in its title. *The Learning Divide* is alive and well in the UK, and older people suffer from it. For too many, older age brings poverty and marginalisation, poor self-esteem and caution about expressing opinion. For those who do join in, however, there is a rich reward in confidence, curiosity, and engagement, but the challenge to reach different as well as more adults must not be underestimated.

Key points

- Older people are as keen to learn as anyone else but prefer informal learning, feeling that the formal and vocational is aimed at the young.
- Fewer older people participate, especially among those who have completed their initial education before the age of 16.
- Participation is even less by older women, those who are working class, and therefore inevitably by other social groupings who find it difficult to access education and training.
- Older people obtain information and advice about learning opportunities mainly from friends and family.
- They value learning for personal development, and not just narrowly for work purposes.
- Those who are learning prefer locally accessible learning programmes.

6 Making provision for older people: local authorities

Local authorities have a multiplicity of roles in relation to the creation and maintenance of quality of life for older people. They have an overview of their whole population and demographic trends within it. They are responsible for a wide range of functions which impact upon older people's lives, including social services, libraries, transport, housing, planning and education. They are able to create cross-community partnerships and consultation and to plan services coherently for client groups. Many frame their policies and planning to redress poverty and social exclusion. They target services towards those most in need of support, such as known areas of deprivation, with high unemployment, low income and a high proportion dependent on benefits, including some older people.

Information and learning are essential factors in supporting people within their communities, and Education Services are therefore integral to their welfare in a variety of contexts. Unfortunately in many cases joint working among local authority services is not clear or developed and this can result in a series of different, sometimes overlapping and even conflicting responses to the needs of older adults within the population.

So far as learning for older people is concerned, under the Further and Higher Education Act 1992, Local Education Authorities have a key role as providers of Non-Schedule 2 adult education, that is the range of informal adult education not necessarily leading to a vocational qualification, and not specified under the Act as Schedule 2, funded by the national Further Education Funding Councils (FEFC) or differently defined as higher education funded by the Higher Education Funding Council (HEFC). The Authorities, however, have a statutory duty to secure adequate further education opportunities for those members of the population who do not want to attend an accredited course or who are not following a vocational aim. There is no definition of what comprises adequate provision.

NIACE Cymru has published (1998) *Gearing up for Lifelong Learning: an Adequacy Manual for Local Authorities and their Partners*:

- setting out the different duties and powers in respect of FEFC-funded Schedule 2, and non-Schedule 2 education;
- suggesting ways of surveying community profiles, participation in learning and auditing provision, with means of quality assessment;
- setting up local partnerships, with examples including 'Swansea as a City and County of Learning', and the Rhondda Cynon Taff area.

Response to the duty to secure is carried out in a variety of ways in local education authorities throughout the country. A majority deliver through providing a direct service but a significant proportion deliver through contracts with further education colleges, and a further cohort secure provision through community schools or a mixture of any or all of the above models. Thus the response by the local authority in relation to the delivery of adult education activities to older people may be directly controlled or made through another organisation which will choose its own priorities unless these are clearly set by the contracting authority.

Participation by older learners

Local education authority adult education is of particular interest to older learners and it is very likely that it is the main kind of provision where they are represented in the greatest numbers and where those with least previous educational experience are likely to be found. Work done in relation to the mapping of participation in further education shows that older adults tend to prefer non-accredited courses in art, languages, music and information technology, and in general these are likely to be provided through local authority funding rather than through any other funding body.

The Open University's Older Students Research Group survey in 1987 indicated that the most popular choices of LEA provided studies by older learners were:

- practical crafts 28%;
- arts 18%;
- languages 16%.

NIACE's 1996 Gallup survey for the DfEE published in *The Learning Divide* 1997 indicated that the most popular areas of study for those over age 50 were as shown in Table 6.1.

Table 6.1 Most popular areas of study

Subject %	Age 45-54	55-64	65-74	75+
Computer studies	18	15	21	16
Foreign languages	9	12	25	16
Other leisure subjects	7	9	13	9

Source: *The Learning Divide*, Sargant *et al*, 1997

Local authority adult education is locally determined and there is no defined national standard of adequate provision, in terms of quantity or quality. Local Education Authorities are not currently required to prepare development plans for their adult education services, although many do so from choice to enable locally elected members to define priorities for directing their services. Plans are not collected centrally and it is only by surveys carried out by outside organisations and completed voluntarily that information is currently collected. The Strategic Plans collected by the FEFC may cover Non-Schedule 2 provision but it is not a requirement. The lack of a definition of adequacy and local decision making about adult education provision has led to the development of very different levels of provision in different areas of the country and to different prices and arrangements for fee concessions. Access for older people, as for others, is a lottery which depends on location.

There is a limited amount of data available on participation, most of it drawn from the statistical snapshot supplied to the Department for Education and Employment each year, just after enrolments in the autumn term.

Table 6.2 Total Local Education Authority enrolments for each year

		Male			Female			Total persons
		Under 19	19-59	60+	Under 19	19-59	60+	
1995/6	Non Sch 2	14018	144416	53708	23867	443114	148394	827517
	Sch 2	4754	79508	8981	11749	207302	13302	325596
								1153113
1996/7	Non Sch 2	14286	143990	56432	23070	486454	158168	882400
	Sch 2	6003	80126	10768	14443	222119	16156	349615
								1232015
1997/8	Non Sch 2	12301	116499	52465	19019	379853	150635	730772
	Sch 2	5344	76197	11100	10716	211487	16492	331336
								1062108

Source: DfEE, 1998

Table 6.3 Percentage of total enrolments for each year

		Non Schedule 2			Schedule 2		
		Under 19 (%)	19-59 (%)	60+ (%)	Under 19 (%)	19-59 (%)	60+ (%)
1995		3	51	18	1	25	2
1996		3	51	17	2	25	2
1997		3	47	19	2	27	3

Source: DfEE, 1998

While the total enrolments for non-schedule 2 study have decreased over the three years by almost 12 per cent, the enrolments of students over age 60 have increased by 0.5 per cent giving them a 27.8 per cent share (men 7.2 per cent, women 20.6 per cent) in 1997/8 as opposed to 24 per cent (men 6.5 per cent, women 18.0 per cent) in 1995/6. Women consistently outnumber men by almost 3:1.

Enrolments for Schedule 2 provision have increased marginally (1.7 per cent), but enrolments of those over age 60 have increased significantly (23.8 per cent); increasing their share from 6.8 per cent (men 2.8 per cent, women 4.1 per cent) in 1995/6 to a still modest 8.4 per cent (men 3.4 per cent, women 5.0 per cent) in 1997/8. Women outnumber men by about 3:2.

While the fees for Schedule 2 courses may be cheaper because of FEFC funding of their accreditation, Non-Schedule 2 study by those over the age of 60 is by far the most popular option.

Local authority adult education, like much other provision, tends to attract those who have benefited already from a reasonable standard of initial education although this is rather less the case than in other forms of provision, such as Further and Higher Education. The Open University's Older Students Research Group study of older adults in LEA adult education shows that 42 per cent had no qualification at all in entering and a further 18 per cent were educated to below GCSE level. However, most recruits to local authority classes are in social classes A, B and C1, rather than C2, D and E. Adult education in local authorities is also skewed towards enrolments by women and it is normal to have a ratio of 72 per cent women to 28 per cent men in much community-based provision.

- In Kent in 1996/97 students over the age of 60 were 25.8 per cent of all AE students. In humanities, arts and design, 45 per cent of students were over 60, but in business, basic education, languages and personal development the proportion was considerably less.
- In Dorset in June 1997 of all courses:

<i>Type of course</i>	<i>Male age 50+</i>	<i>Female age 50+</i>
FEFC funded courses	27.3%	17.9%
LEA non-schedule 2	64.8%	60.8%

74 per cent of all Dorset's students over age 50 were women.

- In Wakefield 28 per cent of all AE students in 1996/7 were over the age of 50.
Source: Older & Bolder survey of LEAs, 1997

Local authorities providing adult education will respond to the needs of older people in a number of ways. The general programme will of course be open to them and this will normally comprise a range of non-accredited activities which will include arts and crafts, languages, personal development, business, administration and information technology, and sports and fitness activities. Local authorities are also major providers of basic skills although older adults are not significantly represented in such provision. Local authority provision is usually made in community-based settings, or one-off locations within the community like village halls, church halls etc. Libraries are active sources of learning, as well as providing educational information, advice and guidance, and are especially user-friendly to older people in both urban and rural areas. In these ways, LEAs' provision is accessible to older adults even when their ability to move out of their immediate locality becomes more limited.

Funding

Funding for the LEAs' provision of adult education comes from national government via the Revenue Support Grant, based on Standard Spending Assessments, but is a general education budget not earmarked or 'ring-fenced' specifically for adults' learning. In addition to their own provision, LEA adult education services may also provide accredited programmes funded by the FEFC, as well as other provision to meet particular targets from outside funding sources, for example European Union funding streams (ESF) and Single Regeneration Budgets (SRB). However, in general adult education budgets have suffered from expenditure constraints on local authorities and many have been substantially reduced. We welcome warmly the Government's decision to signal the importance of local authority provision by requiring authorities to develop Lifelong Learning Development Plans, linking adult education provision to other local authority services, like the libraries and economic regeneration, to other local providers. This decision is backed by DfEE funding through its Standards Fund. With some luck and perseverance this may mark the end of a decade of declining resources.

Older adults have suffered from consequent fee increases, and in a number of instances the cut-back of concessionary fees offered to older people. Rates for older people vary from total remission in some cases to full fees in others but most authorities do make some concession to older adults, and those on means-tested benefits normally obtain non-vocational provision free or substantially reduced. However, full fees for courses can be between £50 to £80 for a 10-week term, 2-hours per week, and this is prohibitive for many people living on fixed incomes. The

Greater London Forum for the Elderly revealed, in their annual fees survey of the London Boroughs for 1997/8, standard fees for arts activities ranging from £3.34 per hour down to £1.00 with concessionary rates ranging from £1.90 per hour to no charge.

Access to provision

In accessing local authority adult education, older adults may experience difficulties in obtaining information, advice and guidance as many authorities provide only very basic educational guidance services. Student support in terms of specialist help with visual and hearing impairment is not always available. However, because of the very local nature of such provision and its general friendly atmosphere and ambience it prides itself on flexibility and accessibility. Social support is considered a high priority and there is case study evidence that the quality of learner support is high. Some local authorities encourage and work with self-help groups, and consciously promote inter-agency working in relation to caring roles and carer support. A considerable proportion of provision is now made during the daytime in local authority work and this too makes it possible for students to attend even in rural areas where public transport networks are not strong.

Wolverhampton Adult Education Service develops its activities for older people through consultation with an Older Persons' Working Group, as part of its Lifelong Learning Campaign working with older people, colleges, Social Services and the voluntary sector. There is also a Students' Council, and an 'over -55 focus group'. Attendance by older people is mainly day time and classes are timed to fit in with bus passes. Venues are being improved to ease access and to accommodate sight and hearing impaired students.

Hounslow Adult Education and Training Service targets older learners through day-time courses, changes venues to assist with transport difficulties and offers some 'pay-as-you-go' courses to make fee payments more manageable.

Strategic planning and collaborative working

In the best authorities there are good links with social and health services and provision may also be made in residential and day-care settings, but this kind of provision is patchy and inconsistent. However, most local authority adult education development plans, where they exist, will deal with and wish to respond to the needs of older learners. In some areas of the country the

- In Tayside, Scotland, the **Discovery Award** was pioneered in 1992, giving certification for a designated group or community learning activity; from this *The Mature Scot* was developed as a magazine and directory of information to promote learning for older people, later adopted and amplified by the Scottish Community Education Council.
- **Hampshire County Council's Recreation and Heritage Department** through its Learning in Leisure Programme offers financial support to self-help learning groups.
- **City of Wakefield Metropolitan Borough Council** provides free accommodation and some financial support to U3A.
- **Northampton, Wolverhampton, Redcar & Cleveland Adult Education Services** are among those who deliver adult education programmes in Social Services Day Centres, Local Authority Residential Homes following consultation with Social Services, Housing Departments, Age Concern and the voluntary sector.

Source: Older & Bolder LEA survey 1997

responsibility to secure adult education involves far more than direct provision and local authorities will support organisations like the University of the Third Age (U3A) and other voluntary bodies who are working with older people. While LEAs have the capacity to link with other organisations in the community and can establish a strength of partnerships of providers, in many cases the necessary links are not yet developed.

In some LEAs' development plans, a wide range of strategies for dealing with older learners' needs are identified. There are good examples of practice in making learning more accessible, in terms of the curriculum offered, targeting their particular interests, drawing on voluntary agencies expertise, providing better and identifying suitable locations. Some examples taken from the Older & Bolder LEA Survey (1997) include:

- **Redcar & Cleveland Strategic Plan** in its *Issues and Challenges* recognises that there are 'declining population levels with an overall increase in the number of elderly people in the Borough' and as part of its Social Justice Strategy 'recognises the real needs of key groups who suffer disproportionately from poverty including the elderly'.
- The **Vale of Glamorgan Department of Education and Libraries** sees learning in retirement at the hub of a wheel influenced and steered by local groups and societies, U3A groups and Pre-Retirement courses. It plans explicitly for different responses to needs: concessionary fees, non-vocational classes, basic skills, lunch-time lectures and skill sharing. Age is no limit.
- **Lancashire County Council Adult Education Annual Service Plan 1998/9** includes 'Later Learning: Key Strategic Actions':
in partnership with Lancashire Age Concern, arrange opportunities to help people cope with widowhood;
 - organise residential courses on 'Positive Ageing' to examine the benefits and problems of ageing;
 - investigate the possibility of collaborative work with the University of the Third Age;
 - provide pre-retirement courses for employees in local organisations;
 - organise taster days to attract those who are approaching or have reached retirement in order to encourage them into learning;
 - network with NIACE in respect of the Older & Bolder Project;
 - investigate new ways of promoting learning opportunities for the elderly through new partnerships with voluntary and statutory organisations.
- **The Older Learners project in Southwark** uses a huge range of venues and has a programme developed with pensioners forums and the elderly care planning group. The participation in the programme by older people from black and minority ethnic communities reflects the ethnic mix of the borough.

Local authorities which set out to reach those learners who have not been able to access provision so far will need to develop imaginative strategies for doing so. One way that has been found useful is through specific projects related to health provision. Examples of this are cited in the Older & Bolder LEA Survey, 1997 and in *Adults Learning* (Judith Challis, 1996, published by NIACE).

- **Gloucestershire County Council** Adult and Continuing Education and Training Service working with Gloucestershire Health, Gloucestershire Training and Enterprise Council and others have produced a newspaper supplement which acts as a directory of available services with contact names and phone numbers but also deals at length with opportunities to learn, and obtain work – paid or voluntary;
- The **Kent Adult Education Service** working with the local Health Promotion team launched a scheme in Thanet in 1995 and now being developed in Gravesend and Maidstone – whereby General Practitioners are able to 'prescribe' learning by referring patients on to a wide range of AE 'Bodywise' Health and Fitness Courses. In a survey of users at the end of the first year 49 per cent of the respondents proved to be age 60 or over with 26 per cent over age 70. Seventy-six per cent noticed an improvement in health, 73 per cent completed their course, 65 per cent were new to adult education, 38 per cent had introduced friends to Adult Education.

As older people become more frail it is important that provision is still made for them. Many local authorities have excellent projects working either directly with older people or with the care staff responsible for them in residential care homes and day centres, both publicly and privately funded. In Gloucestershire there have been projects assessing the needs of such learners and there are examples of excellent projects which demonstrate effective working in care settings. At the same time, the needs of carers themselves rarely receive attention: whether family or voluntary care in the home, or by care staff in different settings, they need support for their own learning. The Older & Bolder LEA survey in 1997 noted the following:

- **UNISON** trade union has over 30 local authorities offering basic skills training to care workers (as well as classroom assistants and catering staff) many of whom are part-time or night shift workers, and may themselves have been disadvantaged previously in the education system. There are 4 UNISON-led projects funded through the DfEE's sponsorship of the Union Learning Fund, including one in Suffolk enabling unqualified care workers to gain accreditation for their job experience.
- **Durham and Hampshire County Councils** through their Museum and Library Services provide materials to stimulate reminiscence and activity work among older people in residential and day care settings.
- In Norfolk a partnership of representatives from the county Adult Education Service, Social Services and Libraries Departments with the local Health Authority has created **RAFE (Reminiscence Approaches with Frail Elderly)**. The work has three strands: the provision of training for carers in reminiscence techniques; the development of a resource pack to support carers, and; the development of different themed 'Memory boxes' which act as triggers.

Apart from the local education authorities and their role in adult education, there are many other local authority functions within which adults are learning by experience and informally, on a regular basis, and where more effective strategies could be developed to identify and progress learning. Older adults involved in tenants and housing groups in local authority housing and in housing associations are involved in training schemes; adults who are engaged in social services day centres are often provided with activities which are educative in nature even if they are not defined as such; older people in large numbers access leisure facilities; and they are often employed as volunteers, as tourist guides and in museums. Many authorities help older people by providing access to facilities for their own purposes or through the production of directories of opportunities

which specially publicise those which are designed to appeal to older learners. Library services are of crucial importance and remain a key point for learning even when people become housebound and very frail.

The Havering Development Support Programme created and funded through the Basic Skills Agency and run by Havering Adult College not only works with older people as day centre users and as participants on residents' and tenants' associations but also works with first point of contact staff within the local authority to increase their awareness of the needs of those they meet.

In new unitary authorities there is an opportunity to link together different services to particular client groups. Lifelong learning officers could be appointed to liaise across departments, and it would be possible for cross-authority bodies to work specifically to meet the needs of older people within populations. The Government's project, Better Government for Older People, may begin to address this agenda of inter-agency planning and delivery of services.

The responses to the NIACE 1997 Older & Bolder Survey of Chief Education Officers, and members of the **Local Education Authority Forum for the Education of Adults (LEAFEA)** revealed:

- 50 per cent of English and Welsh Local authorities acknowledged the increasing numbers and needs of older people in their corporate plans;
- 89 per cent had a partnership or local forum to plan education provision;
- 66 per cent felt education for older people was integral to local authority social and other service provision.

Key points

- Local education authorities' duty to secure adequate facilities for adult education is not defined or related to specific standards of provision and resources.
- There is little co-ordinated planning of provision for older learners, related to community needs.
- There is little co-ordination of information, advice and educational guidance targeted towards older people.
- Nevertheless, LEA-provided programmes recruit substantial numbers of older learners, especially women.
- There is a need for collaborative local planning, among both statutory and voluntary agencies, to integrate lifelong learning opportunities with other local services for older people.
- Much could be done to facilitate self-help groups of older people, in learning, civic and in caring roles.
- Some authorities, particularly those involved in the Better Government for Older People programme, are developing inter-agency working and partnerships which could plan the delivery of lifelong learning to older people.

7 Making provision: Further Education sector

The traditional view of Further Education Colleges as providers of vocational non-advanced further education for the 16 to 19 age cohort has meant that the further education sector has not been seen as a major provider of education for adults. However, before the Further and Higher Education Act 1992, some local authorities chose to deliver adult education to the full range of adult students through their maintained Further Education Colleges, often in community-based locations. Following the 1992 Act which removed Colleges from local authority control, delivery of some non-vocational adult education by sector Colleges has continued and OFSTED, through its 1996 Review of Adult and Youth Services, has indicated that approximately a quarter of local authorities deliver their adult education through a contracting arrangement, largely with the FE sector. Within this particular element of provision it may be assumed that the age pattern is not dissimilar to that in local authority provided adult education of the same sort, although there are no hard statistics available to either disprove or confirm this supposition.

The definition in the Act of the Schedule 2 Further Education curriculum as the delivery of qualifications leading to vocational outcomes, and the restriction of funding to accredited courses and basic skills, has meant that publicly funded further education is less attractive to older learners. They are very much in the minority in provision funded by the Further Education Funding Councils.

The FE sector is large and complex and includes 450 sector colleges, as well as specialist institutions like the City Literary Institute, the Working Men's College in London and the Workers' Educational Association's national network, all of which especially attract mature learners.

WEA Leicester:

Courses designed especially for the retired or over-50s. The WEA has a number of courses aimed at older adults, particularly those who have recently taken retirement and are seeking active discussion and friendly company or wish to develop a new skill or hobby. Examples include:

- Discussion groups
- Computing for the over 50s
- Painting with water colours
- Aromatherapy

WEA Thames and Solent:

1995 recruitment statistics showed that the age profile varied considerably between programmes, with informal adult education being predominantly taken up by the over-60s, work-related learning by those aged 40-60, and access studies by the under-40s.

The local delivery of FE overall is complicated by the delivery of a proportion of FEFC-funded provision by other community-based adult education providers (most commonly local authority adult education services) and by the increasing accreditation of programmes in order to attract public funding and reduce the price to students. To give one example, it is now relatively uncommon to find courses in modern languages which do not offer some form of accreditation even though this may be optional for students.

Participation by older learners

The substantial growth of the FE sector, and in particular the disproportionate increase in part time students as well as students studying in 'external institutions', indicate that the total number of older learners in FE has grown. However, the proportion of older adults in Further Education remains small. NIACE's surveys on participation show an initial decline in participation in learning by older adults following the 1992 Act followed by an increase, particularly of enrolments in information technology, one of the subject areas which has been a very significant growth area for the sector as a whole. In 1996/7, 11 per cent of all FEFC-funded students were over the age of 50, with 3 per cent over age 60.

Regrettably, statistics relating to older adults published by the FEFC use only two age bands, 25 to 59 and over 60, so that data on age bands between 50 and 75+ is not accessible. An additional problem arises from the work that Further Education Colleges carry out with older students, but funded from a variety of other external sources, requiring less rigorous collection of data on individual students.

As budgets have been cut, the concentration of funding on the vocational curriculum and a reduction in the scale of local authority contracts for non-vocational adult education have meant that, without specific targeting, College programmes have not been attractive to older adults. Much outreach provision has been focused on those returning to the labour market or seeking to improve employment-related skills.

Even in the FEFC's Kennedy Committee Report *Learning Works*, which relates specifically to widening participation, the needs or rights of older people to access further education are not explicitly addressed. However, Kennedy implicitly makes the case for older learners by identifying learning as a key issue for social inclusion, emphasising the need to widen participation in further education not only for the sake of the economy but for the well-being of society as a whole. The report makes recommendations to Government, to the FEFC and to institutions, identifying effective strategies which, if introduced to benefit all learners, would benefit older people also.

Funding

Mainstream FEFC funding regimes do not offer particular incentives to recruit older adults, and in the absence of an explicit policy, there is much local variation in practice. Although the sector's recruitment targets mean that many of the additional 500,000 extra learners to be drawn into FE and HE by 2002 will be mature students, most of these are expected to be of working age and economically active. In an increasingly ageing society this priority target may change over time, within the agenda for widening participation with its inclusive strategies and rewards for recruitment of those from areas with low participation rates.

The demand for efficiency savings in the sector following a period of rapid growth has put considerable pressure on college budgets. In some instances, reduction of funding has caused rationalisation of sites and the loss of community outreach facilities, thus reducing participation. In other instances colleges have found community-based work a significant aid to development, and facilities in the community have increased. But general funding arrangements have not been driven by a need to engage with older learners, and the local decisions made by colleges in response to funding regimes can adversely affect their prospects of learning in FE.

Cost is a serious issue for many older people in taking up any learning opportunity. Although all

FEFC-funded courses will offer remission of fees to those on means-tested state benefits there are no automatic concessions for those on retirement pensions or those with disabilities. The hidden costs of learning, transport, books and equipment, even the costs of coffee breaks can make participation expensive. Those on limited income just above benefit level will have particular problems, as will those in rural areas where public transport is less frequent and travel costs are high. Colleges which are successful in recruiting older adults have tackled the problems of cost by a mixture of approaches including the use of external funding, reducing costs for older learners through a College remission scheme or charging only registration fees to older learners.

The FEFC in its response to the Government's Green Paper *The Learning Age* is eloquent in expressing the argument for addressing the learning needs of those over 50 and the benefits of their engagement both as learners and teachers in the learning process. It argues for the resourcing of their participation but does not claim that their needs will be met through current or revised FE funding structures or their extension.

Access to provision

The initiatives and activities which have encouraged older adults to participate in FE have been derived from the mission of individual colleges rather than general funding arrangements. While many institutions may regard this client group as of little interest, for others specific strategies have been developed to increase numbers and to reach different and less accessible groups of older people. Where colleges see themselves as serving whole communities and perhaps particularly where they are the main providers of the full range of Schedule 2 and non-Schedule 2 activities, there are instances of very active commitment, pursuit of other funding streams and innovative good practice.

Mid Warwickshire College runs:

- FEFC-funded 'Never Too Late' course combining Information Technology and job search skills;
- Pre-Retirement Planning activities;
- free English as Second Language courses for Asian elders.
Strong links have also been established with:
- Satkaar, a Social Services-funded project for older Asian women;
- Ageing Well with Health Authorities and
- a Recruitment Agency to target older adults seeking work.

Source: *Older & Bolder FE Survey, 1997*

Hackney Community College devotes a page of its prospectus to older learners promoting:

- classes in computing, crafts, keep fit, discussion groups, music appreciation, art appreciation, and introduction to the Internet;
- other health and fitness activities;
- Hackney Pensioners Press; and
- The College of the Third Age (C3A).

The College also runs an English as Second Language Course (ESOL) for Vietnamese elders.

Source: *The Community College, Hackney 1997/8 Prospectus*

Older adults wishing to engage in further education continue to face a number of obstacles. Some of these are social and psychological while others relate to physical facilities or the behaviour of institutions themselves. The barriers are obviously different for different groups of older learners but colleges wishing to meet the needs of more active older people have to adapt practice, and those hoping to deliver to increasingly frail and housebound older people will meet more substantial challenges. For all institutions there will be particular issues in reaching older adults from communities where participation in learning is low. Older people in social classes C2, D and E are extremely unlikely to participate, so that it will require new and imaginative approaches to reach, encourage and support them especially.

For some adults, assessment and accreditation regimes in further and higher education are a considerable incentive; for others they are an intimidating challenge – especially to new learners at the point of joining a course. While those who are confident consumers of learning are well able to exercise choice over accreditation, and appreciate that a certificated course is cheaper, those new to learning are not likely to feel that they are able to take it on unless they receive very skilful guidance. However, there is much anecdotal and case study evidence of the value of accreditation to learners who have not achieved qualifications in initial education and probably, over time, they will become more comfortable with it. Finding creative routes for older learners to progress their choice of learning through different modes and levels of study, via programmes which provide movement between different modes and levels of study, whether mainstream or discrete targeted courses, will be essential and benefit all ages of learners anyway.

If learning is to attract older people, the curriculum offered may have to be adjusted to increase recruitment. This may mean adapting mainstream opportunities to the needs of older people e.g. computing for the retired, or developing a range of opportunities which cater for the lifestyle of this particular age group where voluntary work, learning new skills to keep up with families or new leisure interests are all likely to be important. Colleges which are successful in targeting older adults have tailored programmes to meet their needs in other ways. Shorter programmes lasting for a term at a time, tasters to enable people to try before they buy and outreach programmes in local premises have all brought success. In one college there is a gap in programmes during the cold weather and darks night of January and February, in another later starts and earlier finishes mean a better fit with the timetables of the older people.

North Tyneside College runs a course designed to meet the needs of retired people by offering them the opportunities to develop new interests and build on existing skills through a variety of individual and group learning experiences. The course, *Leisure in Retirement*, is not aimed at telling retired people how they should spend their leisure time, but offers them the chance to discuss, question and contribute to the course and its contents. For students over 50 the course is free. Participants are encouraged to maintain a file of their course activities for which they may receive an award from the Tyneside Open College Federation on payment of an assessment fee.

Centres of Interest:

- *Current affairs* – how pensioners can influence events: leading a discussion.
- *Local history* – especially using retired people as a resource for writing history.
- *Hobbies and interests* – an opportunity for each member to present their own interests to the group.
- *Visits* – emphasis on the skills of planning visits for clubs, voluntary organisations and specialist groups.
- *Individual presentations* – how to give a presentation on a topic that could be offered to a local organisation, WI, WEA, Soroptimists, Rotary, etc., or presenting a case to a local government agency, local enquiry, the media.

In publicising what is on offer colleges will have to make sure that the relevance of the general curriculum to older adults is made apparent in publicity material through photographs and case studies and through making sure that details of fee arrangements and specifically targeted programmes are highlighted. Some colleges have developed outreach guidance to recruit in community locations used by older people. Colleges may be associated in the minds of older people with the young, and with work and vocational training. Images are important and publicity needs to portray the Colleges as welcoming a wide range of students, a place where staff have time to deal on an individual basis with enquirers.

The Community College, Hackney

School stops – education doesn't!

Introducing the College of the Third Age for the over-fifties.

Learn the skills you never had time for.

Try something new!

Revisit your favourite topics

And meet others with the same interests.

Figure 7.1 *The Community College, Hackney publicity leaflet*

The 1997 Older & Bolder FE survey found, among others, the following examples of practice:

- **Brighton College of Technology:**
 - works closely with Social Services to target need;
 - makes tutors aware of potential special needs and/or skills of older students;
 - provides activities at times preferred by older people – daytime and weekend;
 - programmes some courses to have winter breaks in January, early February;
 - timetables as much as possible to ground floor accommodation, and;
 - encourages lift sharing to centres.
- **Mary Ward Centre, Holborn, London:** runs an Over-60s Club staffed by volunteers and an activities programme to complement its mainstream programme. In November 1996 82.5 per cent of the programme uptake was female. Of the club uptake 68 per cent confined themselves to the activities programme, 36 per cent the club only (social activities in the main) and 32 per cent attend the club/activities programme and mainstream courses.
- **Bridgwater College, Somerset (Prime Time); Wirral Metropolitan College (Learning in Later Life); Bilston College, Newcastle under Lyme College; Abraham Moss Centre, Manchester; and Hackney Community College** (all Colleges of the Third Age [C3A]) have all created or are considering creating self-help self-run clubs, and able to access charitable and other funding sources to complement targeted taught courses for older learners.

All colleges will provide guidance for older learners as for their other students but very few colleges have specific support for older learners, and the part time nature of older students' attendance may make the provision of a suitable package of support difficult. Problems with hearing loss, visual impairment and dealing with the college's physical environment might or might not be met. There might be less understanding of the study support needs of older people who may be very unfamiliar with using technology or learning independently. Social needs may include dealing with loneliness or with negative pressure from families and peers about an older person going back to learning. In some colleges the social aspects of learning for older people are recognised through the development of self-help groups and links with local groups for older people. Such approaches can increase opportunities for new directions in learning as well as providing increased social contact and engagement within the community.

As adults become older and maybe increasingly limited in terms of mobility colleges will need to work in partnership with other organisations if they are to meet their learning needs. Partnership with LEA providers and those in the voluntary sector such as the University of the Third Age are useful contacts but so are those organisations which work more informally with older people such as Women's Institutes, churches and local voluntary organisations. Many colleges have established fruitful partnerships to deliver courses to very frail elderly people through day centres, residential homes and social services.

Examples of this, discovered by the 1997 Older & Bolder FE survey, include:

- **Park Lane College, Leeds** which has developed a multiagency/modular approach to work with older people in South Leeds. Three target groups have been identified as:
 - frail elderly people in residential care, sheltered housing or who attend day centres;
 - elderly people from ethnic minority communities using bi-lingual tutors;
 - elderly people in areas of high social need and living on low income.

Source: Park Lane College Discussion document

- **The Community Programme of Northampton College** seeks to extend adult education in residential homes with older people. Underpinning this work is an effective advisory process which involves the Borough Council - education, social services, housing and the voluntary sector.

The work is mainly funded by Non-Schedule 2 and in the main is art, craft and reminiscence based. Many of the residents came from a generation which received little or no education.

One of the residents and students is Archie Brown, who aged 100 entered the NIACE Senior Learner of the Year Award in 1997 and received a special certificate from Northampton College.

Work in the centres and off-campus helps the college retain and develop community links. The advisory group looking at the needs of older people, because of their wide range of backgrounds bring the differing experiences and aspirations, monitoring techniques and funding opportunities necessary to keep such work vibrant and relevant.

- **Southampton City College** has an Adult Education Organiser for Older Learners who has developed activities for older learners in residential homes, sheltered accommodation and day centres across the city working with Social Services, Age Concern, housing associations and a community school.

As shown, there is a wealth of good practice in engaging with older people through further education but little support from funding mechanisms or policy and planning priorities.

Key points

- Older learners are part of the overall widening participation agenda for the FE sector.
- FEFC funding mechanisms need to provide resource incentives to colleges for the recruitment of older learners.
- Colleges need to review their premises, facilities, outreach and publicity, to ensure they are user-friendly to older people.
- Colleges need to review their curriculum, to extend it suitably for older learners.
- Accreditation needs to be user-friendly, recording individual achievements and leading to more flexible progression.
- Partnerships with other education providers, and voluntary agencies concerned with older people and their learning, can build innovative and effective ways of encouraging more older learners to join in.

8 Making provision: higher education sector

In many ways, higher education (HE) has more in common with broad, informal adult education than with FE. The goal of HE is to extend knowledge, and transmit it widely, for those who are willing and able to share this purpose to a high standard of achievement. The process is not age-related, and should not be confined to younger people. As in FE, many of the barriers to older people's access are about mode, location and timing of programmes, but other factors need to be taken into account also.

Participation by older learners

The proportion of older people learning in HE in the UK is low. The Dearing report identifies HE students over 50 at 0.28 per cent of that population age group compared to 22.74 per cent of the age group 18 to 20 participating, and an all age average of 2.37 per cent of the whole population aged 18 and over. Society for Research into Higher Education (SRHE) data from the Higher Education Statistical Agency (HESA) shows that only 4.55 per cent of students in HE are over age 50, (0.5 per cent of all full time students and 12.6 per cent part time in July 1996). By contrast, 17 per cent of students of the Open University are aged 50 and over.

One problem is that older people are invisible in higher education statistics and it would be helpful if the Higher Education Funding Councils were to divide their age categories to enable the identification of the number of older people within institutions. HESA and SRHE are collaborating in producing evidence of this nature and are to be congratulated but this is not yet universally available nor used in official statistics.

By contrast, in the 'traditional Universities', although recruiting very few older people on to degree qualification courses, liberal non-qualification bearing 'extra mural' adult education provision was well subscribed by older learners. The 'new' universities, the former polytechnics in the main, have also recruited a significant proportion of adults over 50 to broad adult education courses. These learners are most likely to have achieved a successful initial education already, although this is less certain in older age cohorts and particularly for women. Overall, however, although older learners have shown themselves keen to take part in educational opportunities at higher education level, opportunities to join mainstream degree-level programmes are less accessible, apart from a few shining examples.

In recent years, 'extra-mural' programmes have been absorbed into subject-based university departments, and their distinctive adult education flavour has often been lost – to the disadvantage of older learners. Increasingly non-accredited programmes are less available or alternatively have become more expensive for participants. The focus on accredited programmes, which attract funding, is aimed at recruiting a younger age group so that learners over 50 years of age are a minority. This is due partly to the perceptions of the providing institutions, and partly to the

The **University of Strathclyde**, in Glasgow, established the Learning in Later Life programme in 1987. Under the leadership of Lesley Hart, this has developed into the Senior Studies Institute (SSI) with a large taught programme supported by research and development. The SSI encourages older learners to:

- move into mainstream education programmes, via optional accreditation;
- develop employability through appropriate training;
- promote their role as researchers;
- develop inter-generational learning projects;
- organise inter-generational exchange of students and information;
- act as a self-determining body, organising extra-curricula activities.

For example, students at SSI undertook, as volunteers, an environmental project, mapping access routes, pathways and features of interest in the estuary shoreline of the river Clyde. They noted also in their report that:

- there was no single local authority taking responsibility for monitoring the shoreline;
- environmental issues are often seen to be the concern of younger people;
- their initiative might encourage other groups of older people to take the lead in community-based projects.

The SSI also offers staff development opportunities to other Departments, in adult teaching and learning. It is celebrated as an integral part of the University's response to the community as a whole.

perceptions of the learners who sometimes see accreditation as at best irrelevant to them, or at worst an institutional barrier to their participation. It is due also, in many instances, to a lack of planned and structured connection to the broader base of informal learning and community education, with no coherent accreditation system that admits prior and experiential learning.

Funding

As with FE, much of the national Higher Education Funding Council's (HEFC) focus so far has been on vocational outcomes and direct progress from one level of qualification to a higher level. Some attitudes and much policy still pre-supposes that higher education is a form of tertiary education, ie for school leavers still continuing with their initial education rather than a system which meets the needs of the whole population. This belief is still current even when mature students, ie those over 21 at entry, have out-numbered younger people within the system for a number of years. The system also still operates as though full-time rather than part-time students are the predominant mode in spite of the growth in numbers of part-time adult students as the major proportion of enrolments. Lack of financial support for part-time students inevitably excludes many older learners who cannot afford to pay full costs, and even the welcome extension of student loans from an age ceiling of 50 to 54 (from April 1999) is linked to the intention to return to employment.

As a consequence, the presence of older learners in HE is unlikely to be taken into account, to form a focus in strategy plans or outreach programmes or to be considered in the development of curriculum. Effectively, older people and their needs are invisible in mainstream provision. The Open University is an exception to this: one in five of Open University students is over 50 and of

these students a significant proportion (15 per cent) have no formal educational qualifications at all before commencing their studies. Despite the very different mode of distance study, fee and support structures of the Open University, there are clearly lessons to be learned from its welcoming approach to adult learners.

Access to provision

In conventional universities there are several different approaches which can support older people's learning:

- 'extra-mural' liberal adult education provision which older students happen to access although it is not specifically targeted towards them;
- attending classes and public lecture series as non-registered students, exemplified by the Cambridge Rural Programme;
- where an academic discipline (educational gerontology), is associated with targeted learning opportunities, as at Surrey and Keele;
- a targeted 'Learning in Later Life' programme where older people form a large and important body with well-organised provision on-campus and established links to mainstream programmes, exemplified by Strathclyde;
- development of targeted projects to determine older people's learning needs and funded by the Higher Education Funding Council for England (HEFCE) as 'Non-Award Bearing Continuing Education' in order to widen participation;
- a local University of the Third Age supported by the university in its activities in the community sometimes with tutor input and/or use of space;
- community responsive, with older people as just one of several target groups, as the institution interprets its local social responsibility role, in addition to national recruitment.

In the current programme of projects funded by HEFCE there are a number of programmes which explicitly target older students. Nine universities have seen this as an important means of widening participation and the liberal adult education programmes at other universities have supported the recruitment of older students. Unless there is a specific programme which targets them, few older people are on university degree courses. They are less likely to receive specific guidance, find that student support is geared to younger people rather than the specific social and learning needs of mature adults, and that university staff have had little training or staff development in teaching and learning for older people, especially those who are entering higher education for the first time. Conversely, institutions as a whole can benefit from the presence of older learners, bringing prior experience and knowledge from elsewhere, creating better intergenerational learning groups, and with a substantial personal commitment to advanced levels of learning for the sake of their chosen subject.

Coventry University in embedding its HEFCE/NABCE-funded programme for older learners believes that it is not a simple accountancy/spreadsheet equation, but an 'alternative currency' – a value-added argument where older people contribute to the economy of the institution by:

- conducting and contributing to research, for example twentieth century women's politics in Coventry: volunteering for research into rheumatoid arthritis;
- supporting undergraduates on courses for example dyslexic students;
- promoting and marketing through parents and grandparents;
- extending undergraduate skills and opportunities, that is, students as volunteers working with older people/learners in the community.

There are several examples of good practice from which better provision overall might be developed, although, without the incentive of targeted funding, programmes can be costly to develop from scratch.

For many years The **University of Central Lancashire** has had an active role in older people's learning activities in the North West of England. It has:

- created and offered limited support to 60 University of the Third Age type groups operating under the banner of Life Long Learning;
- produced and distributed a regular newsletter to the groups until this function was completely taken over by the members six years ago;
- run a summer programme of activities for and in many instances led by older people. From this:
- an older people's theatre group was formed – The Guild Players;
 - a computer group meets regularly using university facilities with its own reserved area one afternoon a week and now creating its own web page;
 - hosted an annual lecture series on ageing and education issues in memory of a Life Long Learning activist;
- supported exchange visits by LLL members to Flanders in 1993 as part of European Year of Older People and Inter Generational Solidarity;
- created and obtained charitable funds to offer a biennial bursary for women over the age of 60 with no previous HE experience to prepare for and study towards a degree;
- supported the development of the European Commission funded European Network on Ageing and Ethnicity as a result of activities during 1993;
- provided and equipped an office for a core team of older people to produce and distribute the newsletter, organise forums, conferences, exhibitions and summer programmes.

While no direct correlation can be proved, the university has one of the highest proportion of full time undergraduates over the age of 50 in the United Kingdom (1994/5 0.76 per cent, 1995/6 1.02 per cent).

The work done by the University of Brighton and the University of Sussex working in partnership with University of the Third Age learners also demonstrates ways to recruit older adults with few qualifications into mainstream provision. Derby University too has developed useful links with the University of the Third Age.

The **University of Derby** has:

- developed links with its local U3A which led to a negotiated summer school – art and design based – attended by up to 1/3 of the group's membership;
- included older learners within its plans to create a strategic partnership with other local interested parties.

The **University of Brighton** has:

- obtained HEFCE NABCE funds to develop in collaboration with University of Sussex day schools for older learners;
- developed links with Sussex and Eastbourne U3As which have led to taster days in Information Technology, Art & Design;
- provided accommodation for U3A meetings and language classes;
- successfully dealt with issues around flexible time-tabling for 'abnormal' activities outside 'normal' working hours such as staffing support, availability of audio visual equipment, learning resources and adequate catering facilities;
- recognised the following relevant issues:
 - levels of awareness of the need for curriculum content to demonstrate that it is age, gender and ethnicity inclusive;
 - awareness of teaching and learning methodologies required for a broader constituency;
 - policy on staff development in support of the above;
 - availability of counselling and guidance both pre-entry and on course;
 - feedback to students.

Drawing on the experience of the Open University, with others already established, and the recent HEFCE-funded developments, higher education institutions need to develop a better curriculum for older learners, as a substantial market for learning.

Key points

- Mainstream higher education programmes are least accessible to older learners, and the direction of funding towards vocational programmes causes institutions to focus on young more recent school leavers.
- Inequity of funding part-time and especially older learners limits their access to HE as well as FE.
- We need a coherent accreditation system which includes HE levels as well as FE, and allows for accreditation of prior and experiential learning (APL/APEL).
- There is added value to be gained in drawing on the knowledge and experience of older learners within intergenerational groups.
- In order to widen participation, and tap a new market for learning, HE institutions will need to target older learners in future.
- Additional funding both to institutions and to learners is essential to make this happen.

9 Making provision: the voluntary sector

What is broadly called 'the voluntary sector' includes a diverse range of activities and organisations, some national and large in scale, some run by employed staff and some entirely by unpaid volunteers, some small and local in their focus. Their common bond, however, is an ethical concern about public life, and the value of unpaid volunteering work to society.

The recently completed Carnegie-TSB Foundation Third Age Volunteering Project, wishing to enhance volunteering by older people, focused on their entry, esteem and effectiveness in voluntary settings. Their final report: *Potential of a Lifetime* (1998), made recommendations to increase and enhance opportunities for third age volunteers.

Voluntary organisations are the essence of learning by doing, as well as seeking and providing educational opportunities, both formal and informal, through their particular ethos. The learning involved is of value both to the volunteer and to the community as a whole benefiting from the voluntary work output.

Professor Bernard Crick, in his final report of the Advisory Group on Citizenship, to the Qualifications and Curriculum Authority, in September 1998 stated:

We firmly believe that volunteering and community involvement are necessary conditions of civil society and democracy. Preparation for these should be an explicit part of education.

For this broad purpose, there are three types of learning to be taken into account:

- through specific volunteer activity, with experience and knowledge gained and in some instances being valued through accreditation;
- how to lead and run a voluntary organisation, with appropriate training for volunteers, committee members and staff;
- the provision of formal or informal structured programmes of education and training offered by the voluntary sector to their constituencies.

There are many different voluntary agencies concerned with the provision of education and training, whether as their prime aim, or to support other social objectives. Some are:

- directly for educational purposes, such as the University of the Third Age (U3A), or Workers Educational Association (WEA);
- for a wider purpose, but include an educational focus within it, such as the National Federation of Women's Institutes (NFWI), Dark Horse Venture;
- committed specifically to older people, such as Pensioners Forums which include

education and training to empower their constituents (Age Concern England, Royal National Institute for the Deaf);

- others cover all age ranges but just happen to attract significant numbers of older people to their work, for example the National Trust with a volunteer force of which 67 per cent are over 55, and another 14 per cent between 45 and 54 years of age.

The National Trust – Involvement of Older Volunteers

The National Trust's volunteer programme creates fresh opportunities and new challenges to everyone, regardless of age. A lifelong interest in heritage, art or the countryside frequently leads older people to volunteer their time to the Trust and play an essential role in areas such as visitor care, fund-raising and conservation. Others prefer to continue using the professional skills they spent a lifetime acquiring and provide expert assistance with building surveys, health and safety, computers and other technical support.

- Of the Trust's 37,400 volunteers, an estimated two-thirds are aged over 50, with many hundreds in their 70s and above.
- Since 1994, a special range of Working Holidays have been run especially for the over 50s. Started with financial backing of external sponsorship, the popularity of the projects with both volunteers and property staff ensures a place for these projects in future Working Holiday programmes.
- Local volunteer support groups who traditionally meet at weekends are now being supplemented by mid-week groups of retired people who want to work on countryside conservation.
- Entire projects and functions are being run by teams of volunteers such as literature distribution in Wessex; restoration of water turbines by retired British Gas engineers in Northumbria; travelling Exhibition Team in East Midlands.
- Hundreds of senior volunteers help as garden stewards and as assistant gardeners.
- Retired teachers and others regularly dress up in period costume to help with living history projects and other educational projects.
- Retired members of Health and Safety Executive provide advice and guidance on health and safety matters.
- Over 400 mainly retired volunteers work as National Trust lecturers to deliver an estimated 3,000 talks per annum to local clubs and societies.
- A team of retired senior police officers are helping as Regional Security Volunteers, one in each of the Trust's sixteen regions.

The experience of the Co-operative Society shows that older people have the time and commitment to be involved in its democratic organisation. The Co-operative College, near Loughborough, offers educational programmes to members who volunteer to serve on committees and in other active roles. Of their 203 current learners, 35 per cent are over the age of 55. The Co-operative Retail Societies comprise a major business, turning over several £m each year. Of their elected Directors in charge of operations, 66.5 per cent are aged 56 and over, with 38 per cent aged 65 or over, and the average age is 60.

Greater London Forum for the Elderly has offered its members skills training in financial organisation, communications, running meetings, dealing with people in authority etc. to enable older people to represent their own interests directly. In Lewisham, the Borough's Equal Opportunities

Unit has supported older women's groups in developing research, reporting and presentation skills, in the context of projects related to health and housing.

The **Workers' Educational Association (WEA)** is an exemplar of a voluntary ethos which democratically empowers learners, enhancing their role as citizens, has a long established tradition of negotiating curricula to meet learners needs, offers them means of influencing and managing their own learning and attracts a wide age-range including a substantial proportion of older people. A snapshot of provision includes:

- a Frail Elderly Project in London, Thames and Solent, running local history courses in residential homes;
- in Eastern region, reminiscence courses using film and other media resources to explore 'social memory' and 'recovered history';
- in Northern Ireland, the Sixty Plus project works in community centres, day centres and residential homes offering drama, creative writing, welfare rights information, 'self secure' about personal safety, yoga, 'People's History' and 'Reminiscence and Recall'.

In the main, the voluntary sector education providers are more flexible and responsive in their approach to older learners, and therefore have direct and wide ranging experience of older participants. They know that life is not all about work, and work is not all about paid employment. They recognise the value of unpaid roles: both men and women's domestic support of their families, active citizenship and caring roles in the local or national community. All of this voluntary work helps to sustain the delicate balance of all our lives, and enhances the active independence of older people themselves.

Voluntary sector education providers are more conscious, therefore, of the need to empower older people. Accustomed to working with volunteers, they are practised in providing, often alongside courses of formal or informal learning:

- recognition of individual independence and experience;
- advocacy and means of older people voicing their own concerns;
- support in relation to social rights and welfare benefits;
- appropriate curricula negotiated with the users;
- training for volunteer and civic roles;
- information, advice and guidance.

The most powerful evidence of demand for learning for its own sake has been the growth of the U3A (University of the Third Age), targeted at those who have retired from paid work. Since its establishment in 1982 in the UK, it has grown to over 75,000 members in over 370 local U3A groups, covering many different topics in about 7,000 study or activity groups. It is estimated that about 250 subjects are covered. As a self-help study movement, groups select their own topics, identify their own tutors, and meet in each others homes or rented accommodation, as well as organising field-work and small group visits. There is a federal structure, with substantial autonomy for local U3As, and a small national office. The national office has a supportive role, as the resource centre, and a base for Co-ordinators Support Group, as well as subject networks (for example in modern languages, where an Interpreters Network has been formed). Unlike the original French model, there is generally no formal affiliation between the U3A movement and the universities as a whole, although in many local instances there are arrangements to borrow space, and sometimes specialist tutors, or to collaborate in projects. In Scotland, the U3A was rather slower to start, perhaps because of the strong community education base, complementing

the universities 'extra-mural' provision of broad liberal adult education. The U3A is an extremely effective mechanism for informal learning at low-cost to individual participants. The movement, however, comprises mainly those who are already convinced of the benefits of active learning and have had good previous experiences. By definition, self-help learning is not structured as a progression, with accreditation routes. While some local U3A branches have consciously publicised their activities and reached out to contact and encourage those who do not find it easy to participate in education, such initiatives are limited inevitably by the lack of financial resources and organised support structures.

The **Université du Troisième Age** originated in Toulouse France in 1972 under the leadership of Pierre Vellas. This has led to a French model of U3A in which older people negotiate with their local university for the use of expertise and facilities. An international association AIUTA with representatives from over 20 countries was formed which from 1993 recognised also the British model of U3A, as the norm in Australia and New Zealand while the rest of mainland Europe has tended to follow the French model.

In some instances there is an almost accidental age-skew of membership, as in the NFWI (National Federation of Women's Institutes) with nearly 8,000 branches in 70 County Federations in England, Wales and the Channel Islands. The WI has about 260,000 members of whom the majority are over 50. As a consequence the NFWI's commitment to education benefits older women especially.

The **National Federation of Women's Institutes** (NFWI) was established in the UK in 1915 as a membership network to support women living and working in a rural environment. From the start the development of education for women has been a prime purpose, and is provided for members who wish to take on representative roles in the NFWI's operations, for volunteers who wish to support other activities, as well as broad liberal adult education programmes open to all members and their families. Course programmes cover an immense range including public speaking skills, creative writing, a wide range of arts and crafts, environmental subjects, and introductory maths and sciences, the latter in co-operation with the Committee for the Public Understanding of Science (COPUS). These functions are carried out by:

- 20 Lifelong Learning Centres based in County Federations' headquarters and designated as local learning centres;
- Voluntary Education Co-ordinators, as advisers to County Federations and local branches;
- travelling tutors and trainers who can be commissioned by Federations and branches to offer short sessions in subjects chosen by members;
- Denman College with a throughput of over 6,000 students in 1997/98 and offering a wide range of two to four day residential courses, some with accreditation as an external institution via Abingdon College of Further Education;
- the National Education and Training Network, the committee representing the membership in the oversight of all the NFWI's educational programmes.

The strength of the NFWI's provision rests in its range of purposes and choices for women members, and the flexible mode of learning in short incidents, with the benefit of Denman College creating space for residential immersion in learning and for development activities. Overall, NFWI:

- offers high quality educational provision which is both formal and informal, for women who traditionally find returning to formal education difficult;

- recognises the value of lifelong learning for older people, and intergenerational learning, to strengthen families and the wider community;
- encompasses family and work, and encourages involvement and active citizenship;
- offers locally accessible learning, with support of advice and guidance;
- delivers learning in comfortable peer group settings, which enable women to feel confident and achieve;
- recognises the importance of volunteering and voluntary work, allowing women to gain accreditation for volunteer roles through group leadership training;
- supports the development of communication and presentation skills, for public life;
- increases potential, encourages independence and participation.

In other instances, voluntary agencies have supported learning in more instrumental directions, for example:

- Age Concern, as a direct service provider has a well co-ordinated central structure for campaigning on social issues for older people, and also has a strong local and regional presence through its shops, information points, Age Resource help-desks etc. It is well-placed therefore to provide advice and guidance, especially to support its long-established provision of education and training programmes for a variety of purposes including voluntary work. It also carries out research and development work, is currently engaged in organising the Millennium Debate of the Age, and provides the secretariat for the UN International Year of Older Persons in 1999;
- Help the Aged is a major fund-raiser with national co-ordination and support for widespread local branches. In addition to a strong educational ethos, it has focused on particular schemes to meet social needs, for example research and development work to provide NVQ levels for carers, both voluntary and employed, and particularly in rural or isolated environments with funding from the National Lottery for good causes, Help the Aged has developed a Millennium Awards Scheme for older people's projects, such as 'Lifelong Learning for Fun', based on John Ruskin School, Coniston;
- Third Age Challenge supports a network of projects aimed at developing new skills for, and the employability of older people; such as the Fenix Project below. In addition to benefiting the direct participants, these initiatives have provided models of good practice which can be adopted elsewhere.

The **Fenix Project** in South Yorkshire is an integrated recruitment, guidance and training service for the unemployed over 50s, supported and partly financed by the European Social Fund. For those aged 50 plus and unemployed benefits are:

- a place on an intensive programme, tailored to individual needs;
- follow up support and assistance in obtaining a job, or training leading to a job;
- entry onto a computerised job matching database;
- access to, and information about the main options available to the unemployed;
- free relevant training in line with employers' needs; and
- access to lifelong learning opportunities.

Other examples include:

- The Pre-Retirement Association (PRA), based near the University of Surrey which itself has a strong teaching and research base around older people, offers courses at colleges and other recognised educational centres throughout the UK. The courses are targeted towards helping people to effect the transition from paid work to independent living in retirement, and so concentrate on health, finance, organisational skills and personal development. The PRA's Annual Survey for 1997/98 showed a national total of 30,000 people on pre-retirement courses, with the vast majority being over 50 years of age, and a shift upwards of the average age, perhaps the beginning of a trend to later retirement from paid work;
- Dark Horse Venture encourages and supports older people in identifying new directions for their lives. As part of this ethos, it provides guidance towards existing education provision, and also arranges learning programmes to meet evidenced demand where no suitable local provision is available, for example in the arts (Encourage Programme). Through its Age to Age Project developed with the Institute of Human Ageing at the University of Liverpool, DHV is helping older people create distance learning materials for other older people;
- Anchor Housing specialises in the provision of social housing for older people, in a variety of schemes including conversion of older building stock to more suitable environments, new-build sheltered housing and communal residential care. Activity programmes and learning opportunities are an integral part of the service provision and Anchor is involved in research and development work to extend their curriculum for older learners among other purposes;
- With funding from the National Lottery Charities Board (NLCB), NIACE is supporting WISCP (West Indian Seniors Citizens' Project) in Leicester. The project aims to contact Afro-Caribbean elders in different community environments in order to encourage them to identify new interests or concerns which can lead to learning, for their own purposes;
- Magic Me in East London challenges young people to use their energy and creativity to enrich the lives of older people living in residential homes or meeting in day care centres. Their most recent work has been with Asian elders in Tower Hamlets. One group helped to create, print and sew a fabric collage banner depicting the contrasting habitats of Bangladesh and Wapping; another took water as a theme and researched stories to use in dance/drama and then to make and decorate traditional water carrying pots;
- Both the Royal National Institute for the Deaf (RNID) and for the Blind (RNIB) engage with lifelong learning, providing programmes of education and training as a means of achieving greater independence for those who have to endure impairment of hearing or vision to varying degrees. Recognising that both hearing and sight tend to deteriorate significantly in older age, the different programmes offered are particularly crucial to older people, especially those that include different uses of technology as tools or aids.

There are many other examples of housing associations, church organisations, local health practices, which have consciously included educational programmes in their service provision, seeing learning as fundamental to active, independent living in older age. In many instances, such programmes depend on partnerships between voluntary and statutory agencies, in social, health and formal education services. Increasingly, there are many instances of committed and effective partnerships: for example, Wolverhampton local authority has developed a lifelong learning strategy as part of a co-ordinated approach to local authority services in the Borough, especially targeting older people in a multi-ethnic community; in Coventry, a cross-service approach is being developed for older people in the community, particularly in the context of the City's anti-poverty and economic regeneration strategies. Both of these initiatives have become part of the Better

Government for Older People Programme, established by the Government's Cabinet Office in 1997 to elicit more co-ordinated and coherent policies in support of older people in their communities, and to identify models of good practice.

Of course partnerships are not automatically benign or easy to bring about. To be fully effective, they need to be founded on a fair and equitable basis, with mutual trust and confidence. That means voluntary agencies and volunteers must be valued for their experience and expertise, they must be treated with equal weight and not as subservient, the partners must agree on common goals and structures, and resources need to be clearly identified and shared to common purpose.

These are ambitious aims, not easy to achieve, and needing commitment, energy and tolerance from all concerned.

Key points

- Many different organisations in the voluntary sector have a wealth of knowledge and experience about the provision of learning opportunities for older people.
- Voluntary organisations provide an interface with those older people who are in need of learning support because they are poor, lack confidence and self-esteem and are isolated from social contact.
- Volunteer roles provide direct learning by experience, and lead to self-determination for older people.
- Voluntary groups involved in providing learning value informal learning for personal development, as well as formal programmes of education and training for specific purposes.
- Relevant voluntary organisations make a substantial contribution to the development of real lifelong learning, as valuable partners in planning local delivery with LEAs and other providers.

10 Making provision: information technology and broadcast media

For adults generally and older people especially, media for distance learning are ideal. They are flexible in time and place of delivery, with open access to subject choice regardless of prior knowledge or qualifications, and optional progression towards other subjects and other levels of study. Potentially they blur the boundary between informal learning for its own sake, and more instrumental learning with qualifications attached.

The media themselves are varied and flexible: print materials (still ideally portable), the press, radio and TV broadcasting, video and increasingly computer-based with the advent of the Internet. An even wider range is promised through digitised TV linked to computing and telephony. For those who prefer to study at home, or who are less mobile or housebound through fragility or disability, or who need access to material in different languages, or cultural contexts, open and distance learning offers real benefits, including being cheaper and broadly more affordable.

Given the success of the Open University, linked to radio and TV programmes since its establishment in 1969, it is surprising that this highly successful means of encouraging adults to return to learn has not become more widespread. The Government, however, has given a new priority to the rapid development of Information and Communications Technology nationally. The National Grid for Learning will upgrade and link not only universities, colleges and schools, but also libraries and other local centres for learning, with the potential to reach a wider range of community locations. The University for Industry, to be launched in the year 2000, will be a powerful medium to analyse and fill the gaps in learning provision, not only work-related learning, but also on the wider front of social and health-related topics, and education for active citizenship. Through broadcasting this technology based expansion has the potential to deliver directly into people's homes and will also provide more effective means of canvassing users and consumers views about learning, as well as promoting active learning through a wide range of subject choice. A new dynamic can be developed, which need not be exclusively technology-based, but offer a different flexible mix of learning at home, alone or in family-groups, and learning in a tutored group in another local centre.

Information and communications technology

Already our lives are dominated, and in many ways made simpler, by information and communications technology systems. The development of the microchip and the personal computer has moved computing beyond the preserve of the specialists and into everyday life, out of academic mystique and into essential living for all. Already, about 25 per cent of households own a personal computer, and ownership is spreading rapidly.

For all of us the new technologies deliver:

- aids in the home, such as automatic control and security systems;
- information, advice and guidance, including health, civic and public affairs;
- communications with family, friends and agencies at a distance;
- entertainment and creative interests;
- learning programmes, whether vocational, qualification bearing or informal.

All these applications are especially significant for older people. Technology contributes to maintaining their quality of life and independent living, especially for those who are isolated socially or geographically, or are frail or disabled. The European Union recognised this in running the Technology Initiative for Disabled and Elderly People (TIDE) from 1991 to 1997, now located in the new Framework Programme for Information Society Technology. It gives direct and faster access to information, with more choice, and covers a range far beyond the bounds of people's personal interface. From market surveys, the fastest growing group of Internet users are over the age of 55. Of course, Catch 22 can apply, the increasing reliance on technology in the home can lead to social isolation as people become computer-nerds, to the exclusion of other means of interaction. The cost of hardware, software and the weight of commercial suppliers' interests can be a barrier to access for those who are poor, as well as confining the range of programmes to satisfy the demand of the already knowledgeable and affluent, who can afford to pay. There is a danger that those who cannot become increasingly excluded as the information poor.

In order to extract maximum benefit from technology, we have to learn new and advanced skills, to use it effectively. So it's hardly surprising that learning about computers is no longer dominated by the young. The largest growth area in adult education is in IT for older people. Many intergenerational programmes have been developed in schools and colleges where older and younger people achieve mutual benefit by learning alongside each other, as a two-way exchange of knowledge and experience. From the Gallup survey commissioned by NIACE in 1996, we found that those learning currently or recently (within the last 3 years) in computing/IT subjects analysed by age, were as in Table 10.1.

Table 10.1 *Participation in computing/IT subjects by age*

Age	17-19	20-24	25-34	35-44	45-54	55-64	65-74	75+
% participation	11	12	16	22	18	15	21	16

Also there is now a relatively even level of participation in computing studies across class boundaries, among the retired and unemployed compared to those in employment, and only a slightly higher participation by men rather than women.

Clearly, older people are as avid to learn about IT as younger, seeing relevance and importance of such learning to their own lives. 'Hairnet' in Islington offering Internet education via the World Wide Web and targeting learners aged 50+. The BBC's excellent 'Computers Don't Bite' programmes on TV and radio generated more than 200,000 calls to Learning Direct, the national freephone help-line for educational advice and information, and about 30 per cent of calls were from people over the age of 50, colleges offered taster sessions, and about 40 per cent of callers to Learning Direct attended these. Teachers in schools and colleges intend to go on using the learning materials provided. Consequently FE and HE institutions have begun to realise that there is a whole new market of learning demand out there, and courses are being tailored to their needs.

Indeed there is almost a cottage industry of 'Seniors' IT networks, sometimes financially supported by commercial IT suppliers. There are U3A self-help groups offering mutual support in learning about computing, research groups, programmes to train older people as trainers and mentors, groups learning to renovate old computers for re-distribution to worthy users.

The Government in giving a priority to improving learning opportunities on a lifelong basis, has introduced **Learning Direct** as the national, free at the point of use, telephone system for educational advice, information and guidance. In time, this will connect with local, and personalised systems much more accessible to adult learners. Since its establishment in February 1998, Learning Direct has helped nearly 400,000 callers.

Broadcasting

For people aged 60 and over, ownership of broadcast receivers encompasses 100 per cent of 2-adult households, and 77 per cent of singles (although they are least likely to have satellite or cable receivers, with only 11 per cent of 2-people and 4 per cent of single householders). With such extensive reach, radio and television are major providers of both mainstream informal learning and dedicated educational programmes. They offer a vast range of choice and open up new horizons for the listener and viewer. Video ownership, at over 70 per cent of households provides for time displacement of viewing. The advent of digitisation will offer better quality, a greater number of channels, and ultimately inter-activity for the user able to link in computer and telephone communications. In the context of legislation on broadcasting, educators continue to advocate the need for recognition of its public service ethos, the need to protect the public interest, and the need to deliver information and knowledge to all free of charge at the point of use. There has been a consistent lobby to require all broadcast companies to programme a proportion of air-time for educational purposes, in mainstream as well as marginal time-slots.

Television and radio play a key role in the lives of most older people. Particularly those who are housebound, physically frail, with sight or hearing impairment, or disabled. They provide a source of information about what is happening in the world, a source of stimulus, a source of entertainment, and a form of human contact. British Audience Research Bureau (BARB) shows that people over 65 watch television for an average of 36 hours a week, compared to 18 hours for 16 to 24 year olds, and an all age group average of 25 hours. Yet until recently little attention was given to the growing consumer power of older adults. From the 1960s through the 1970s, the focus was mainly on the young and the contrast between audience make-up and media images reinforced the passivity and exclusion of older people.

While the national newspapers tend to persist with this stereotype, broadcasters have addressed with some rigour issues of ageing and images of older people. As early as 1979, BBC Radio London commissioned a series of programmes called 'Senior Service', advised by Help the Aged's Education Department. Recently, there have been more programmes for and about older adults, or focusing specifically on aspects of ageing; like Channel 4's 'Senior Service' or the BBC's 'Coming of Age'. There have been programmes with starring roles for active, rebellious older people, in 'One Foot in the Grave' and 'Waiting for God'. The BBC World Service currently broadcasts a series about contemporary issues of ageing, in different parts of the world, and Radio 4's new series 'Free Spirit', features Senior Citizens who have achieved major successes, including Dotie Russell, who was an indomitable 68 when she won NIACE's Older & Bolder award for the UK Senior Learner of the Year for 1998. Older personalities such as Richard Ingram and Harry Enfield's dad, have been included in mainstream programmes, while programme and news presenters and even weather forecasters have aged gently, like real people. However, the balance is not yet even: in a recent study jointly commissioned by the BBC and Age Concern, and reported by Guy Cumberbatch as Director of Communications Research Group, Aston Science Park, the evidence showed that older people fulfilled only 10 per cent of prominent active roles in programmes, and only 3 per cent of prime presentation roles, where younger people predominated.

At the same time, some programmes assumed to appeal to younger people, like the BBC's 'Computers Don't Bite', turned out to attract a substantial audience of older people also. This demonstrates an equal and opposite pitfall. Much audience feedback shows that older people do not want in the main to be targeted as a separate and distinct group. When writing to programme

makers and the media generally, they do not proffer their age as relevant information. All the evidence is that they are equally concerned with mainstream issues and programmes. Broadcasters need to ensure that they include the older-age audience feedback in evaluating output and planning new programming, recognising that their interests cross a diverse range, as individuals, and conversely that issues of ageing are of concern to all of us, young and old.

For all adults the media provide the building blocks of civic and political education in the United Kingdom, informing viewers and listeners on events, and setting the parameters of much public debate. With the development of digital and interactive services over the next years it is important that this role is developed with the full range of the United Kingdom's communities in mind.

There are lessons to be learned from other initiatives which empower older people more fully. The GLC's 1982 report on the potential of interactive cable television described pensioners in Reading, Pennsylvania caucusing on Thursdays between 10.00 am and 11.00 am to prepare for a weekly video interview with the town's chief public servant on the state of paving stones, street crime, and other concerns. Putney and Wandsworth's housebound elderly programme recognised the power of pairing an active, mobile learner committed to a college-based programme to support a more fragile person, and building on the link between television as a stimulus to learning and the importance of human interaction to turn latent stimulus into active intervention.

In 1997, under the banner of 'The Learning Zone' BBC2 offered daytime programmes across a range of broad subject interests which covered foreign languages; history; crafts, arts and antiques, and others. The programmes were aimed at a middle-aged to older audience, and were supported by substantial information packs, encouraging viewers by means of a discount voucher to commit themselves actively to short taught courses in many of the short-term residential colleges in England. The total viewing figures were high, for example about 0.5 million each for the crafts, and for history, as was the demand for support packs at about 90,000 for the first series of subjects shown. The core audience proved to be 55+, of the total for art and antiques 58 per cent were over 55 years of age, and 34 per cent were over 65, with more women viewers at 53 per cent of the total. As an older audience, their attitudes to learning varied: those who were retired professionals, relatively affluent saw learning as the key to personal development, on a lifelong basis; those who were poorer with less advanced skills and educational achievements seemed more reluctant to pursue learning for its own sake and felt they were too old to do so. This may in part explain why there was a relatively low take-up of college-based course places, about 5 per cent of the viewing audience. However, another factor will inevitably be that adult learners do not convert automatically into course enrolments and do not conform to a direct consecutive time-scale: they enjoy a taster experience, collecting information and advice for later use when their individual family living and working circumstances make it convenient for them.

Nevertheless, bench-marking your learning externally does have enthusiasts among older people, as the success of the Open University in recruiting retired people as learners shows. Older people also make up a major part of the 2,000,000 weekly viewers who eavesdrop on Open University programming. Each of these examples points to the possibility of television being used as a powerful stimulus to participation. This is borne out by mass promotional campaigns, like the BBC's Family Literacy and Computers Don't Bite initiatives – which have stimulated hundreds of thousands to join in. It is also demonstrated in Adult Learners' Week each year, when all broadcasters combine with local practitioners to stimulate people to give learning a go through the combination of witty learning commercials, celebrity endorsements, and positive images of learners in all their diversity. The success of these initiatives lies in their power to motivate people to do something – to take up activity, to seek advice and guidance, to put a toe in the water. Such motivation is a vital prerequisite in returning to learning after a long break, and needs to be taken into account in developing the National Grid for Learning as a distributed network, and the University for Industry as the new agency to promote wider participation.

Key points

- Older people are keen to learn about and use modern technology, for communications, information and learning as well as entertainment.
- Distance learning programmes are ideal for older learners, especially via broadcasting, with good quality support materials, and occasional access to tutors at local learning centres.
- New national initiatives aimed at widening participation via distance learning need to take into account older people, as a substantial proportion of the population.
- Broadcast and other media need to ensure even-handed inclusion of older people's interests and concerns, and to maintain positive images of their active roles.
- There needs to be feedback of views on both learning and broadcast programmes, ensuring that older people have a direct voice in planning appropriate content and images.
- Broadcast and other information technology based systems are a powerful medium for learning for citizenship.

11 Joined-up government

Opportunities to learn in new directions are integral to the development of individuals and communities. Education and training programmes are the precursors of economic and social independence, enabling people to be creative and innovative, to communicate effectively in different contexts, to share languages and cultures, and to develop new skills as well as social responsibility. One of the earliest actions by the Secretary of State for Education and Employment, was to set up NAGCELL (National Advisory Group for Continuing Education and Lifelong Learning), with a five year remit matching the full term of government. Chaired by Bob Fryer (Pro-Vice Chancellor for Lifelong Learning and Director of New College, University of Southampton) with Vice-Chair by Alan Tuckett (Director of NIACE), the group produced its first interim report *Learning for the Twenty-first Century* in November 1997.

It is clear that older people do not get fair and reasonable access to learning. This has been demonstrated by the evidence of their overall low participation in formal programme provision, particularly by those older people who are excluded as a consequence of poverty, geographical isolation, ill-health, frailty or disability, racial or some other discrimination. The narrow concentration on vocational education prioritised for younger people also discriminates against older generations. It doesn't reach those who could most benefit from change, and underrates the value of learning by doing, by volunteering and by experience, as well as informal learning for personal interest, helping us to develop confidence and risk-taking.

We need more and better provision of all sorts, for everyone, with more resources to make it work. The argument is not simply to redistribute existing provision to the detriment of younger age groups, but to add more older people as a matter of social equity, and by so doing secure adequate facilities for all generations in future. But to do this effectively, we need more coherent policy which can be translated into better co-ordinated practice, at national, regional and local levels. We need different public services and agencies to work together, especially across statutory and voluntary sectors, in the interests of good, relevant and accountable use of resources.

We need to build new partnerships across sectors – central, local, voluntary and private – to deliver integrated, seamless services. We need to value and celebrate older people for the experience they bring, and the active contribution they can make. They are an essential part of the Britain I want to build.

(Tony Blair, Better Government for Older People (BGOP) launch, June 1998)

There is a sea-change in policy-making, with the tide flowing towards social inclusion, to strengthen communities, to respond to the needs of those who have had fewer opportunities in the past, and to be more open and consultative in the process. The Government's Cabinet Office has set an exciting pace. Early in its new term in 1997, the Social Exclusion Unit was established, and now there are two new initiatives specifically relating to older people: Better Government for Older People programme (BGOP) and the Inter-Ministerial Group on Ageing to co-ordinate Government policy and planning across all Government Departments.

The Social Policy of Old Age: Moving into the Twenty-first Century, published by the Centre for Policy on Ageing, (1998) agreed that:

- a large scale government initiative is required now, to bring together cross-generational, cross-sectoral, cross-departmental and cross-party interests to produce a practical and affordable programme of action for the future of our ageing population;
- at national level, the time is ripe to press for a National Commission on integrated policies for a social policy of ageing, to be followed by the creation of a Ministry of Ageing; policy making boards or councils – made up of people of all ages and from a variety of local consultancies – at local authority level would feed into this national level.

Better Government for Older People Programme

Across the United Kingdom the launch of the BGOP Programme is an exciting opportunity to test the capacity of local organisations to co-operate effectively. Created in 1998 with the support of the Local Authorities' Research Consortium based at the University of Warwick, Help the Aged, Age Concern England, Anchor Trust and the Carnegie Third Age Programme, the programme is unique in that it is advocating better and co-ordinated service provision at both national and local levels, planned and delivered through all the relevant agencies in partnership. Programmes must have wider involvement by the voluntary and private sectors, older people and their representative organisations.

The 28 pilot projects are based on local authority areas, and over 50 authorities have requested information briefings about the progress of BGOP. In listing the 315 partner organisations, 4 TECs are mentioned, 5 FE Colleges, 9 Universities, 3 U3As, 3 Third Age learning initiatives and 1 WEA. While the involvement of the 'learning communities' appears low initially this will change significantly as the programmes develop and they are encouraged to participate. With an agenda which seeks to develop and maintain a good quality of life for older people, lifelong learning needs to be an important element with at least three dimensions:

- as a mechanism to increase the negotiating and consulting skills of older people as citizens;
- as a way of enlightening first point of contact staff and people in positions of authority to increase their awareness of the learning needs, frustrations and aspirations of older people;
- as a means to further personal development, skills and knowledge.

An example from the *Better Government for Older People Programme Directory* (1998) is the Wolverhampton Metropolitan Borough Council, Better Government for Older People Programme objectives.

Wolverhampton has a strong track record in developing innovative approaches to involving older people in formulating change and monitoring its effectiveness. This work will be taken forward within the project with a cross-agency commitment to the delivery of a programme of change, including:

- increasing the influence of older people in service planning;
- improving the physical environment;
- increasing opportunities for participation in social, educational and community activities;

- improving employment opportunities for older people;
- supporting older people as volunteers and in inter-generational work;
- improving information and choice;
- promoting positive attitudes to old age.

There are a wide range of partners within the project, most interestingly the Benefits Agency and Inland Revenue.

The Learning Age

The Department for Education and Employment, in its Green Paper *The Learning Age* (1998) articulated the aim of creating an all-inclusive learning society recognising the benefits of lifelong learning for personal development, citizenship, and to enhance the national economy. The concepts of the University for Industry, and the National Grid for Learning are powerful levers to extend access by means of distance learning, focusing on a flexible range of local learning centres, and potentially into homes via broadcasting. The aim to increase student numbers in further and higher education by 500,000 by the year 2002, predominately in the FE sector, must benefit older learners. From autumn 1999, student loans for HE will be extended, from the previous cut-off at age 50, to those aged up to 54, for those planning to re-enter the labour market. The concept of Individual Learning Accounts will be introduced from April 1999, aiming for 1 million to be open by spring 2000. These would give learners an opportunity to accumulate a financial entitlement and a purchasing power which could benefit older people, especially if poolable for like-minded groups. The Adult and Community Learning Fund, with £5m p.a. promised for the three years 1998 to 2001, to prime new ways of working, will help to widen the focus of provision and open up opportunities for mature learners.

For the longer term, the Government's commitment to extending the delivery of learning by information and communications technology holds great potential for older learners. Distance learning modes can deliver new and interactive opportunities for older people. The National Grid for Learning will connect schools and colleges, libraries and other established providers, and encourage wider access by means of distance learning programmes. The University for Industry, combined with the increased capacity of broadcasting developments (both TV and radio) potentially can reach more than 98 per cent of homes.

The DfEE's role within the newly created Inter-Ministerial Group on Ageing will be reviewing all aspects of older people's participation in learning, as an essential lifelong opportunity. The Department is also committed to the Better Government for Older People Programme in line with its concern to widen participation in learning for all, creating partnerships for provision in different settings.

Employment and retirement

In relation to employment, the Department for Education and Employment has confronted age discrimination at all stages, from recruitment, through work-related training, to promotion, by means of a code of practice for employers, to be introduced in 1999. The New Deal arrangements will soon tackle the substantial level of long term unemployment among the over 50's, with pilot projects already taking place to inform decisions to take effect in 1999. The Department has set up the Race Employment and Education Forum, drawing on the expertise of individuals drawn in the main from the black and ethnic minority communities to advise on matters relating to the progress of ethnic minorities in the labour market, including the interface between employment, and education and training.

At the transition from paid work to retirement, with a long and active period of learning, leisure, and perhaps voluntary work to come, the financial well-being of older people as pensioners will be paramount. The Government's present review of pension arrangements is crucial for all of us, encompassing the whole range of private, personal and occupational schemes as well as state benefits. In some parts of the country there are long-established Pensioner's Forums or other older people's consultative groups liaising between forums of local authorities and voluntary organisations. The Pensioners Movement has had a pioneering role in providing a voice for older people, and will be influential within the present government review.

Extending quality life

The EQUAL initiative was launched by the Department of Trade and Industry in July 1995, and continues to have the support of the present government. EQUAL is concerned specifically with prolonging active life so that people are able to participate fully in work, learning and leisure activities for as long as possible. The programme also challenges terms and images associated with older people, and will take into account policy makers' and practitioners' concerns about population ageing, drawing on other key national and international research. It includes consideration of the role of information communications technology, and the built environment. Most importantly, the Programme is concerned with older people's participation and social inclusion as full and active citizens, for whom continuing to be able to learn is an integral element.

Out of EQUAL has come an Economic and Social Research Council (ESRC) research programme led by Professor Alan Walker at the University of Sheffield, which focuses on topics which include what constitutes quality in later life; factors influencing healthy and productive ageing; activity versus dependency; finance in older age; the interface between generations; and the role of empowerment for older people's lives.

Long-term care and housing

The Department of Social Security has established the Royal Commission for the Long-term Care of the Elderly, briefed to report in 1998 on best practice and means of funding. The Commission's underpinning values include statements that:

- old age represents an opportunity, for intellectual fulfilment and for the achievement of ambitions put on hold during working lives; society – those in government, or who provide and develop products and services – should consider the access for older people to leisure, education and the tools that enable people to enjoy these;
- a more positive and inclusive climate must be nurtured, to encourage the development of more opportunities which can be taken up by older people.

Of equal importance within any coherent policy development are those in the housing sector, either as providers of social housing or private, voluntary or statutory providers of sheltered and residential accommodation. Examples such as Southampton City Council providing activities across its specialist provision, South Ribble Borough Council supporting life long learning activities in some of its schemes, Anchor Housing through its promotion of residents' activities and Extra Care Housing East & West Midlands through individual care plans all acknowledge and promote all forms of stimulation. They encourage learning activities in partnership with providers.

Portsmouth City Council as a result of a review of its policy and practice in managing some of its sheltered housing schemes in 1996 plans to:

- open up sheltered accommodation to the wider community;
- improve the social activities within the scheme for elderly residents and other older people living in the vicinity;
- improve the training of scheme wardens and domiciliary aides and encourage joint training between Housing, Health and Social Services.

Warrington Collegiate Institute is an active member of the North Cheshire Health/Cheshire Social Services, a Joint Commissioning Advisory Group for services for older people, aiming (*Older & Bolder FE Survey, 1997*):

- to identify the current range of day to day services across all agencies and clarify the role and contribution they make in delivering comprehensive daytime support to older people and their carers;
- to identify the main forms of complementary services which also support older people and their carers in the community.

Local empowerment

The Department of the Environment, Transport and the Regions (DETR) in its recent white paper *Modern Local Government: In Touch With the People* (1998) proposes local consultation by local authorities with people. This needs to be underpinned by better access to information, and better learning opportunities, in order that local people might exercise full rights of democratic citizenship. This movement towards co-ordinated policies worked up through consultative processes is not new. What is new is the encouragement nationally for such actions. It is notable that in Denmark, all municipalities are required to have a Seniors Council, with an integral role in local democracy. In the UK, we have only some scattered examples of such direct approaches, but through European programmes we may learn more, for example from the involvement of the Coventry-based Community Education Development Centre in transnational projects on the empowerment of older people.

Nottingham City Council host an annual Elderly Voices Conference at which senior decision makers and elected officers in the authority meet with up to 200 older people living in the city with their representative organisations to discuss a wide range of issues affecting their quality of life.

Leeds City Council through its Social Services Department funds the Leeds Older People's Community Care Forum. Linked to 32 community care schemes which operate in nearly every ward in the city, employing 80 staff, with 800 volunteers and reaching over 11,000 older residents, this scheme provides a conduit for older people to express need – local and city wide; to be listened to on issues of relevance and to develop ward based services ranging from 'care and repair', 'winteraid' and bereavement counselling to craft classes, publishing a community newspaper and health promotion work. Initial funding was through Joint Finance, current support is through Social Services with an expectation of Health Authority commitment. It operates with full support of the Leeds City voluntary sector, reaches all community, ethnic and religious groups and involves some local FE Colleges.

Health

Regional Health Authorities have endorsed the beneficial effects of continuing intellectual and physical activity to sustain good health. The Health Education Authority (HEA) through campaigns, and other initiatives such as Age Well to sustain good health, has inspired local Health Promotion Units. The HEA continues to carry out research into older people's health

needs, to inform and review policy towards a national framework of health care, and to provide educational support in specific topics, such as accident and injury prevention, smoking, exercise and mental health, for example. 'Use it or lose it' is an apt concept and slogan, of equal validity when considering mental stimulation through learning and new interests. In Kent, a pilot project was set up by the local education authority in conjunction with several local health practices, in which GPs prescribed adult education as a means of therapy to offset loneliness, isolation and inactivity. In Dudley, an enterprising GP uses the local health centre as the focus for a range of visual and performing arts, with local events as intergenerational activity for all ages. There is growing evidence that education and occupation protect cognitive functions particularly against the onset of Alzheimer's Disease (Source: *Research into Ageing*, report by Richards and Francis).

Those employed in the health sector have an important role to play in the 'joined up government' scenario. They bring direct experience about older people and ageing to bear, and can promote lifelong learning alongside physical activity, as well as share education expertise and resources. Health practitioners including health visitors, surgery receptionists and nurses are most likely to be in contact with those vulnerable, disadvantaged and potentially dependent older people and are therefore best able to prescribe lifelong learning.

Millennium Debate of the Age

Within the current high profile focus on older people, Age Concern England has initiated the Millennium Debate of the Age, a major consultative review on different issues of ageing aiming to raise a high profile for older people in the year 2000. The debate initially drew together key 'voices' on issues including the role of lifelong learning, important to us all as the United Kingdom 'greys' over the next 30 to 40 years. Debates are taking place all over the UK, with all ages, social groups and cultures, hoping to reach 60 per cent of the UK population, in order to increase awareness of the demographic impact, to transmit public opinion and to produce recommendations for all relevant bodies.

The **Millennium Debate of the Age Work & Lifestyle** (1997) interim report identified the following key issues:

- *Starting early* – lifelong learning is not post-compulsory education but an integral part of all learning;
- *Across the generations* – is essential and must be across all generations;
- *Role of employers* – not only to ensure the inclusion of older workers in education and training opportunities, but to create a climate where refining work related skills and self-development are encouraged;
- *Barriers and gateways* – cost, transport, health and disability, information and guidance, support, mismatching;
- *Provision at local level* – 'taking the learning to the learner' (Kennedy, 1997);
- *Learning and the media* – a greater, even statutory reinforced role for the media in offering more educational programming and at peak viewing/listening times.

Conclusion

With the involvement of so many diverse organisations – national Government Departments, Church of England Board for Social Responsibility, Help the Aged, Age Concern, Health Education Authority, Institute of Human Ageing, Research into Ageing, Centre for Policy on Ageing, Economic & Social Research Council, RNIB – it is important that issues are pursued and recommendations made with some degree of co-ordination and co-operation, to avoid misunderstandings, unnecessary duplication of effort and omission of excluded groups.

History shows that most of the opportunities that have been created for and by older people have been in the voluntary sector; through leisure, health, libraries and social services; or by self-help organisations whether campaigning, leisure or learning based. Both the Home Office, and the Department for Education and Employment, are interested in promoting volunteering as a constructive role for older people, and there is a Millennium Volunteers Scheme which not only values volunteer activity, but also the learning which takes place within it. While the impetus may now be from the statutory sector through national and local government it is vital that the voluntary sector role is acknowledged, embedded and enhanced. Moving towards devolved government for Scotland and Wales will provide early opportunities to introduce new ways of working, which could be adopted also on a regional basis in England.

NIACE's Older & Bolder initiative has created some regional networks of those interested in learning opportunities for older people. They include a wide range of learning providers and other agencies concerned with older people. Much relies on individuals' commitment to identify themselves with the issues; to break down barriers of mistrust and suspicion; to create opportunities for collaborative working, sharing of resources and movement in and of the range of provision; and to develop a dialogue between provider, decision maker, purse holder and older people. The networks are resourced at minimum cost by the participants and suggest replicable models which would benefit from regional and local financial and other support.

Key points

- There is a combination of national government initiatives which indicate a new climate of social inclusion for older people, particularly those who have benefited least from publicly provided services in the past.
- There is a growing acknowledgement that access to learning is an integral element of social independence, welfare and health care for older people.
- The Better Government for Older People programme and the Inter-Ministerial Group on Ageing provide mechanisms to develop better planning and co-ordination of services.
- Partnerships between statutory and voluntary services provide good models for delivery.
- There are already several examples of good practice which include learning programmes in inter-agency service provision, and these could be adopted elsewhere.
- Co-ordinated policy and planning must also target those who are excluded in their older age, through poverty, poor health and housing, or through racial or other discrimination.

12 Issues and barriers

So far, we have described the present environment for older people's learning. Now, we need to focus on the factors which influence their access to and participation in learning programmes, and how these might be changed for the better. Some factors barring their access are relevant also to other age-groups: social class; culture and history; ethnicity; and where people live, but some become more acute with older age, such as:

- attitudes and discrimination;
- compounding difference: gender, class, culture and ethnicity;
- frailty, disability and people with learning difficulties;
- motivation towards learning;
- advice and guidance;
- curriculum relevance, accreditation and inter-generational learning;
- the learning environment;
- funding learning.

Attitudes

Ageism is deeply influenced by myths, misconceptions and stereotypes and leads to older people being discriminated against in employment and education. The attitudes of those whose professional activities impinge upon the quality of life of older people and their opportunities for personal fulfilment or contentment often display outmoded thinking: 'They're too old to learn now' is heard frequently. Even the term 'elderly' is used to infer failing vitality, lack of awareness, memory loss, lesser aptitude and being 'past it', although positive evidence and role models contradict this. Sadly, some older people themselves often absorb these attitudes and consider themselves to be of little value. As far as learning is concerned, many believe it is something to be achieved when young: 'I have had my chance'.

There is a fundamental lack of equity in our treatment of our elders. The focus on younger people in the post-war years has excluded elders. Talent, creative thinking and positive action have been assumed to be attributes solely of the young and the role of the old has been deprecated. Media and commercial images have perpetuated the negative stereotypes. As a consequence, older people have not been treated equitably, and their rights as citizens continue to be eroded.

Discrimination in employment obstructs promotion prospects, pay and pension entitlement. Lack of guidance and insecurity about long-term welfare benefits compounds low income. While some older people are affluent despite retirement from wage-earning, others are polarised into poverty.

The more connected and inclusive approach to government and public services, valuing older people for their past, present and future contributions to society, will be the most constructive

way forward to improve education provision. Targeting better access and wider participation by those older people, asserting their rights to learning as integral to their active independence, will benefit society generally, bringing real lifelong learning to the forefront of the debate. With their increasing numbers they will be justified in demanding equal access to public benefits and opportunities, including learning.

At the same time, to change public attitudes to older people is in itself an educative task. Awareness-raising campaigns, information and advocacy service can change attitudes. In educational settings, inter-generational projects and learning groups demonstrate in practice the value of experience contributed by older people, and consolidate their inclusion.

Compounding difference: gender, class, culture and ethnicity

Ageism is compounded by discrimination based on gender, class and ethnic difference. Despite legislation, and the changes achieved by feminism through the 1970s and 1980s, older *women* experience double disadvantage. They are still seen in a secondary role of support to the family, rather than as individuals with a priority for support from others. Yet they live longer, often left alone in separation, divorce or bereavement. They are more likely to have left school early, to have fewer qualifications to a less advanced level, and to have had less continuity of paid work and associated training. They are less likely to have occupational pensions and more likely to be poor. If they are working class, or come from a minority ethnic or linguistic background, they are likely to be seen as less able and more bound to domestic roles. For all these reasons they have greater entitlement to participate in learning opportunities. Indeed the network of older women 'Growing Old Disgracefully' have staked-out their demand to take on new opportunities and activities, and provide feisty role models.

There continues to be a compounding *class* divide affecting chances to return to learn. Older people who have experienced post-school education and training, and those who already have achieved advanced qualifications and skills are already convinced of the joy of learning and return for more. The affluent and professional AB classes, and the skilled C1s consistently participate more, with the C2, D, Es still believing they are too old, or 'education's for other people'. Working class older people are most likely to feel alienated by their previous experience of the education system, and to be least confident about their ability or opportunity to return to learning. To convince them, therefore, providers of learning need strategies which deliver publicly and develop outreach provision in their own locality, in Libraries, Health Centres or village halls, or via mobile units, or direct to their homes in recognised areas of disadvantage.

Britain is composed of increasingly diverse communities and over the next 50 years the current smaller proportion of *ethnic minority elders* will grow significantly. Different ethnic groups participate in learning in different ways, depending on their economic and cultural environments. For most, the achievement of vocational qualifications is important, reflecting the need for financial independence and also reflecting the lack of a coherent system in the UK to recognise skills and qualifications gained elsewhere. For educational engagement some older people will relate to a university or college, but more likely to a local community college or adult education centre. Many will choose to follow their interests and learning within their own cultural community or faith group, especially if English is not their first language, or if they feel more comfortable in single-sex groups.

In 1993, NIACE published a study by Stella Dadzie, *Older and Wiser*, and her main findings are still valid today:

- Educational activity, both formal and informal, is a consistent feature and plays a therapeutic role in keeping older black people both mentally alert and physically active.
- Responses to the educational and other needs of black elders have been largely

dependent on initiatives taken by members of their own communities, who have been first to identify and meet needs, typically on a voluntary basis.

- Projects offering targeted provision are increasingly inhibited by short-term funding arrangements, inadequate premises and anticipated cuts in resources.
- Where local authorities, statutory services and voluntary agencies have been prepared to actively involve and consult with members of the black communities, their efforts to meet the needs of the elderly have been largely successful.
- There are many elderly black people who remain isolated from mainstream services and available educational provision; the expansion of outreach provision, including funding for home tutors and part-time tutors, is essential if this trend is to be reversed.

The NIACE initiative '**Reaching Older People**' funded by the National Lottery Charities Board (NLCB) is working with an Afro-Caribbean Elders project in Leicester to help older people assess for themselves their learning needs, taking into consideration their stage of life, cultural, religious, work and family background and future needs. However, one sensitive limitation has emerged: some church-based Afro-Caribbean groups are reluctant to be associated with initiatives funded as a result of gambling like the National Lottery.

Very little is known about race aspects of ageing with a disability. It is likely that discrimination in relation to black and ethnic minority older people with disabilities will be even more extreme, compounded by poor health, poverty and limited access to services.

Frailty, disability and people with learning difficulties

There is no predictable link between older age, the onset of frailty, and subsequent dependence on care by others. But when people are more dependent on others, their learning needs may be supported inadequately or ignored. The fulfilment of individual needs and aspirations will be constrained by numerous factors including personal mobility, extent of frailty and particular care needs. This applies to people of any age, with learning difficulties and/or disabilities, but NIACE's seminal work on the lack of adequate learning provision shows that this is exacerbated by the onset of frailty associated with ageing. The learning needs of older adults with learning difficulties and/or disabilities are often overlooked. Some have had no formal education at all, as access to school education for children with severe learning difficulties was not available until 1971.

NIACE research shows that their educational needs are often in conflict with the funding mechanisms for further and higher education. A current NIACE/Joseph Rowntree Foundation project (1998) highlights some imaginative examples of education for older adults with learning difficulties. Apart from being rare these classes were also fragile and vulnerable to funding cuts.

As a result of the change of emphasis to care in the community, older people with learning difficulties who have been institutionalised for most of their adult lives now need to learn survival, coping and citizenship skills. Examples of such support work are marginalised and under-funded, but are worthy of more attention and publicity.

Some people may be living at home alone and quite isolated because of their frailty or disability. Others may be cared for by partners or children who are themselves ageing. In developing programmes the needs of the carers (learning, social and for a break from caring) have to be considered. It is important, therefore, to develop mechanisms to identify those isolated to allow them to be included.

Les, 86 looks after Peg, 84, who is confined to a wheelchair. He provides all her meals, puts her chair into the car and takes her shopping whenever possible. When he can he pursues his hobbies and interests as a break. If Peg falls, then Les needs assistance to help her up. Within a period of a few minutes Les himself can move in and out of independence, caring support, and dependent roles.

Share and Care, an ecumenical project in Blackpool, Fylde and Wyre, uses church members to identify vulnerable older people and seeks volunteers from church membership to undertake tasks complementary to statutory and other services which allow for the development of carer and cared for.

The provision of education is as valid for a frail older person in a residential setting as it is for anyone else. We cannot assume we know about their learning abilities and needs, simply because they need specific forms of care, although care regimes will influence how and where and when learning programmes can be provided. There are dangers that learning in residential care settings becomes a lowest common denominator activity – to reach the greatest number of people, in the shortest period of time at the lowest cost and to give care staff a well earned break. Indeed, care staff also need to be involved as their absence reduces any benefits which might be gained by those with cognitive disabilities or dementia, if no one can build on learning activity at other times.

There are examples, however, of innovative and exciting work across the country which actively support the learning potential of dependent older people. Activities using music, poetry and art can reveal forms of expression which are as equally valid as the spoken word. †

Joanna Bornat *et al* (1998), Robert Leaper (1997) and others have commented on the need for high quality training qualifications for staff within care settings whether providing direct care or learning support activities. It is important to acknowledge the context in which learning is to take place, the ambience created by the management and the awareness and abilities of the staff. Issues around the learning environment, use of IT, curriculum sensitivity and range are still valid in residential settings, and for housebound older learners. In this context it is important that a partnership approach be adopted with planning responsibilities, to include the effective voice of the older people themselves as consumers of care.

Some examples of the work around the country include:

- **Extra Care Homes** in the Midlands using personal diaries as sources of ideas for learning and activity;
- **Anchor Trust** and others supporting the development of distance learning approaches, with materials created by older people and for older people through the joint project 'Age to Age' developed by the Dark Horse Venture and Institute of Human Ageing, University of Liverpool;
- **Adult Learning Exchange (ALE)** in Shoreham, Sussex and the Nightingale Lane Home for Jewish Elderly, London offering a wide ranging negotiated curriculum for housebound elders.

Motivation

If people with poor or negative educational backgrounds, low or semi-skilled work experience, low self-esteem and relative poverty are to engage in any learning activity it has to be relevant to

their lives. Perhaps their experience of school has been of failure, frustration and lack of communication. They are unconvinced that anything called 'education' is really useful, or that learning is enjoyable. Conversely, older people are more likely to join in for their own purposes, to follow their own interests, or to bring about greater understanding and control in their lives. They become convinced by self-determination in their own choice of learning, for their own circumstances.

The approaches to learning used in community education and development work demonstrate effective strategies for motivating older people to participate, including:

- talking to people where they are;
- listening to their concerns;
- designing programmes to meet these concerns;
- seeking diverse funding to support the programmes;
- liaising with appropriate benefit agencies, and offering advice;
- mobilising other agencies, community groups, churches and other religious bodies, and voluntary organisations;
- organising provision which is locally accessible.

Projects and programmes based on expressing their own voices, through drama or presentation skills, have huge impact on both learners and audiences. First Framework Productions as professional theatre producers support the Mary Ward Centre over 60s women's drama group in London, and transform their lives with energy, confidence and fluency. Age Exchange Theatre dramatises the complexity of and attitudes to ageing, with older amateur actors presenting uncomfortable scenarios for all of us. The NFWI has a robust programme of courses in presentation skills, and the benefits show in the professional performances of their members and staff on major conference platforms, in broadcasts and in writing.

NIACE's awards for Senior Learner of the Year are publicised within the national promotion of adult learning through Adult Learners' Week, through creating role models to encourage more of them to join in. Broadcasters ensure that 'second chance to learn' tasters include older learners. Adult Learners' Week pioneered the inclusion of promotional material about learning alongside unemployment benefit cheques, and this could be applied also to the issue of pension books, or bus passes, or rail fare discounts.

But the best people to talk about the motivation of older adults are older people themselves, especially those who may have similar backgrounds, or little or no post-school experience. The current NIACE NLCB-funded project referred to earlier is working with groups of prospective older learners in different environments in Leicester, South Gloucestershire and Bournemouth to help them determine and articulate their learning needs. The project is not based on any prescribed programme but attempts to help older people as individuals and in groups to look at the issues of importance in their lives and then to demand satisfaction through new learning opportunities.

Advice and guidance

As with all ages, older people need to think about new learning opportunities when:

- leaving work or changing career;
- children leave home;
- becoming carers;
- suffering bereavement;
- moving to a new home or district;

- making new friends;
- wanting to pursue new interests;
- offering voluntary service to the community;
- dealing with ill health or disability.

Accessible, good quality and effective advice and guidance services have a key role to play in offering them informed choices. Evidence suggests that as people get older friendship networks, library and communication services become more important as sources of information and advice, but to widen participation in learning, support services need to be more clearly identified for and responsive to those over the age of 50.

Among the mix of sources available, although not always universally, are:

- contact with welfare services;
- volunteer bureaux;
- Age Resource Desks being developed by Age Concern England;
- the Third Age Challenge network of initiatives for older unemployed and career 'changers' to make decisions about their future opportunities for learning, training, community, voluntary or paid work;
- pre-retirement courses;
- formal guidance services, so far seen to be mainly for the young school-leaver.

Like all educational guidance services there are inevitably issues around prioritising and targeting those most in need. For older people, the evidence of their involvement in learning in later life shows benefits to society, as well as to them as individuals, and yet adequate support accessible to all has not been proffered. The new national freephone helpline 'Learning Direct' is already dealing with a huge volume of calls, and is 'age-blind' in doing so, but it needs a local infrastructure of guidance services for more personalised individual advice to more older people, targeting those who are less well-informed and drawing on voluntary and non-statutory services as well as statutory providers.

In 1996, the DfEE sponsored *The Way Forward* a policy consultation informed by the Project Report Careers Guidance in the Third Age: a Mapping Exercise by Geoffrey Ford, working for the National Institute of Careers and Educational Counselling. This is comprehensive in its recommendations viewing older people as potential workers paid and unpaid, trainers and mentors in community work initiatives and suggests that older people would be suitable 'third age volunteers' to deliver guidance to their peers. Peer-group mentoring is more effective in providing advice and guidance to older learners. It is implicit within the self-help study groups of the U3A, and within church or faith communities. Professional advisers, such as doctors and lawyers, can often legitimise learning as a useful function for their clients, amplifying their framework of knowledge and expertise.

Curriculum relevance, accreditation and inter-generational learning

The curriculum and its teaching/learning support need careful attention if older learners are to be attracted and benefit. For all adult learners, there are always issues around:

- relevance of content;
- options on accreditation;
- course duration and pace of study;
- adequacy and breadth of curriculum.

For older learners, it is especially important to draw on the value of their longer lifetimes' knowledge and experience in ways which can benefit younger people, providing learning groups with the dynamic of sharing contributions from different perspectives.

Older learners are more acutely aware that their new learning is complementary to their accumulated experience and is often for direct use or reflection rather than as information being banked for the future. They are conscious of constantly interchanging roles of tutor and learner, and less inclined to accept taught input uncritically. At the same time, there is evidence that many older learners initially prefer discrete programmes of peer-group learning as being less threatening. It creates a more supportive environment, while they gain confidence to overcome their self perceived ignorance of the subject matter. The curriculum should reflect these experiences and needs, and ensure that there are routes to connect discrete and mainstream programmes, to allow for learners' progression.

There are some older people for whom some evidence of progress in learning and certification of their achievements will be extremely important. In some instances, this can be a cathartic process to overcome perceptions of earlier failure, in others there can be a direct task-related purpose to achieve. On the other hand, for some the prospect of assessment or examination can be at best irrelevant and at worst intimidating. It is important, therefore, that there is flexibility in provision with options for certification if desired as an activity develops.

The duration of activities is equally important. Older people, like all adult learners, have busy lives with other commitments, and welcome short bursts of learning. For some disadvantaged older learners success achieved quickly is a great motivator. Open and distance learning systems have the advantage of allowing the learner to learn at their own pace. Activities are now being planned to be modular and much shorter than one year or one term duration, making the learning experience manageable and payment of any fees easier. Curriculum development, therefore, should include options on pace of study.

There are issues around the adequacy of provision. Interests of older people are as diverse as those of everyone else, yet often the range offered is limited to subjects it is assumed by others that older people should wish to study. Whether older people are targeted through discrete provision or into specific mainstream subject programmes there is no reason why the curriculum range offered or negotiated should be any less than that offered to younger students.

There is a body of evidence to suggest a strong correlation between poverty and poor literacy/numeracy skills, affecting older as well as younger age groups. Those who are confidently literate and numerate are more likely to participate in civic activities and less likely to need assistance with everyday living tasks. However, only 4 per cent of literacy and numeracy students in the United Kingdom are over the age of 60 and the priority so far has been to focus support on younger people, and those in, or aiming at employment (from Adult Literacy and Basic Skills Unit, 1992). Research by Alex Withnall (1992/95) suggests a number of numerical skills are likely to be used by older adults, for a range of purposes: financial, consumer, domestic, technological, leisure, voluntary activity, 'citizenship', and 'mental notes'. She argues that in the main these needs are linked, and required by all adults all their lives. However, involving older people in basic skills programmes remains a challenge.

Older people are learning predominantly in arts and crafts, and humanities activities. Science tends to be limited to environmental, botanical and zoological subjects. Mathematics or physics and their uses receive very little attention in any later life curriculum, for various reasons such as poor experiences at school, perception of extreme difficulty, unimaginative curriculum, science being seen as a 'male' discipline and a difficult subject for self help learning.

Bill Thompson of Glenrothes, Fife attended basic literacy courses in Fife at age 50 because he wished to help his daughter with her study. Not only was he diagnosed as dyslexic but he was also found to have Scotopic Sensitivity Syndrome whereby black paint on white paper was illegible. Four years later he writes poetry in pink ink on yellow paper and campaigns for greater resources for children with dyslexia.

Dotie Russell, 1998 winner of the Saga UK Senior Learner of the Year Award, at age 66 attended a Women into Enterprise course to help her set up her own fashion business for the older woman.

Inter-generational learning continues to benefit younger and older learners alike. Often the emphasis is on how younger people can support older people in learning in subjects like IT, or alternatively how parents and grandparents can help children with their school work. The best form of learning in mixed-age groups is often forgotten, and the enjoyment of sharing different aspects of knowledge lost. Oral history is a popular source of intergenerational action, but mutual support is equally relevant in formal subjects, including technical studies.

- The **DfEE Learning Opportunity Fund** allowed Hillingdon Adult Education to develop a project in partnership with a local employer, Age Concern and a community school, in which older people are encouraged to be learning helpers within primary and secondary schools through the offer of free IT training;
- DfEE working with Age Concern England, Lloyds TSB, Department of Health and Carnegie Trust, National Council of One Parent Families and local Social Services Departments is piloting a project whereby older people mentor younger students;
- Since 1987 the **University of Central Lancashire** has organised computing courses for retired people. Added support is given by the allocation of a dedicated computer room one day a week where those interested continue to practice, alongside mainstream younger students;
- The **Kensington and Chelsea Social History Group** takes older people into local schools to help with local history projects;
- The **European Association for the Education of Adults (EAEA)** project 'Older People as Helpers in the Learning Process' funded by the European Union's Socrates programme created projects in Spain, Germany, Netherlands and Scotland where older people:
 - assisted in basic skills education with younger students;
 - were trained to support new immigrants;
 - transmitted horticultural skills to younger people;
 - mentored and supported younger people with spinal injuries moving from hospital to home;
 - received training to be helpers in a nursery school.

While recognising that older learners have the right to decide what, where and when they learn, and with whom, both generations benefit from learning together. Older people are valued and opportunities for re-skilling are created in pedagogy, mentoring and supporting roles.

Learning environment

The geographical location and physical environment in which learning takes place is critical to all adult learners, in a variety of ways. For those who can travel by car, adequate well-lit parking

space is important. For those who need to use public transport, particularly in rural areas, costs, frequency and accessibility of services are not always suitable, toilets and cafeterias need to be accessible and for older learners especially, there must be anticipation of the needs of those who have limited mobility, impaired vision or hearing.

In considering the learning environment, providers need to ensure that it is warm and welcoming, and has:

- learning locations with good natural and artificial lighting;
- appropriate two or more toned colour schemes in corridors;
- public areas and all points of access with bright colour schemes, well lit areas, clear legible signs and steps and other potential hazards clearly marked or painted;
- fixed or portable hearing loop systems;
- teaching and promotional materials in large size print or in audio or audio visual form;
- information technology systems to support learning;
- ground floor accommodation with ramps, few steps or if on other levels with lifts accessible to wheelchair users;
- opportunities for carers to participate in the learning experience or some area of interest to them concurrently.

For many older people, programmes are more accessible when there is the option of study:

- during the day and at weekends;
- with a mid-winter break.

Bristol University Department of Continuing Education runs training courses in techniques for working with sight or hearing impairment, including an arts based summer programme for such students.

For those who live in rural areas, isolation, lack of public transport and distant locations for learning are added complications. In her report on learning opportunities for rural elders in the North Cotswolds for Gloucestershire County Council Adult Continuing Education and Training Service (1995), Margaret Whalley suggested the need for comprehensive and holistic approaches which involved carers, used distance learning materials and developed greater awareness of the need for support by non-traditional learners.

Funding

There are two different issues which together limit older people's access to learning:

- funding limitations on the provision of education and training;
- funding support to learners who have difficulty meeting the costs of their individual participation.

These issues are especially important for older learners, partly because many, though not all, are likely to be relatively poor, and partly because there has been a decrease in the supply and resourcing of informal, non-vocational learning which most older people wish to access. FE and HE funding methodologies make it easier to target young people with school-leaving qualifications. At the other extreme, too much of the funding available for innovative work is short term.

The last 20 years are scattered with the examples of short lived, exciting, needs-based initiatives allowed to die for lack of continuing funding. This diverts scarce staff-time to repetitive cycles of fund-raising, reducing their enthusiasm and energy for direct support to the curriculum and the learners.

However, it is important to remember that many older people have the financial resources to pay for their choices of learning. We need to find ways of doing two different things: encouraging people to return to learning in later life; and targeting funding towards those who cannot afford to pay the full cost. Those who make decisions over the allocation of resources have to consider how to devote limited resources to subsidise fees and support costs, and also whether those resources should provide blanket coverage to all older adults irrespective of levels of personal income. Targeting disadvantaged older people, those without previous significant involvement in adult learning may be the most appropriate in terms of equity and empowerment, but this would be more difficult administratively and possibly more expensive.

There are several strands to the debate on funding learning for adults, specifically:

- current fee levels;
- concessionary rates for targeted discrete or mainstream provision;
- the lack of equity between full-time and part-time study;
- differential resources for non-vocational and vocational courses funding;
- access to student loans for students over age 50;
- the potential of Individual Learning Accounts.

In 1988 20 per cent of Inner London's adult education users were retired people, with a strong concentration among the poorest socio-economic groups. They used learning to:

- extend the family budget in dressmaking and cookery classes;
- maintain health and fitness;
- widen horizons;
- keep warm;
- meet people.

They paid £3 to register and then attended any number of classes all over Inner London free. Over a decade the numbers have dropped, fees have risen and the curriculum range has declined, as the post-ILEA boroughs have reacted to reduced funding. Now, as the annual fee survey by the Greater London Forum for the Elderly reveals, there is a considerable difference in fees payable by those on pensions. Two people in the same road but living in different boroughs may be paying different amounts for the same activity.

Fewer older people require vocational qualifications, subsidised by the major proportion of public funding through the FE and HE Funding Councils. Consequently, older people in general are not supported financially, as:

- access to accredited programmes is often denied to older workers and those who are unemployed but seeking employment;
- the diminishing availability and funding of informal, un-certificated learning reduces their access and participation overall.

Access to fee concessions varies widely, depending on the different policies and practice of providing institutions and local education authorities. For those responsible for funding adult education there are two difficult options to consider:

- whether to create a universal age-related concession, irrespective of income but recognising the under-representation of the older age group in learning programmes;
- to develop a means-related concession, backed by support for transport and materials, in collaboration with other local providers and agencies to optimise the use of resources.

An authority-wide 'holistic' policy which identifies funding sources, learning and progression opportunities is likely to be a reasonable motivating force.

The example of ILEA and others shows that cheap, consistent fee policies attract older people and bring wider benefits to the individual, family and wider community. There is a need to plan efficient administrative and accountancy procedures to legitimise such subsidies, but the promotion of lifelong learning has to be a community-wide action, and not fragmented across different elements of education and training.

Financial support has always been greater for those in full-time study, than for part time students. Discretionary grants, to support adult learners into FE and HE programmes, have disappeared. In higher education, student loans will be available only to those up to the age of 54, who can prove that they will be seeking work at the end of their course. Part-time students get no automatic help with fees or maintenance. Part-time students who are registered unemployed have limitations placed on their access to study.

Yet, the evidence shows that the majority of learners over the age of 50 choose to study part time, and that part-time study is increasingly preferred by all ages of adult learners. On this basis, closer examination should be given to costs and the financial support available. The Secretary of State for Education and Employment has instigated the first 1 million Individual Learning Accounts open to accumulating contributions by the Government, employers and individuals in partnership. In the longer term, these accounts could be made available to older learners, over 50 years of age, as a powerful incentive to return to learning, especially if they could be used on a peer group, or family collective basis.

Conclusions

There is no single answer to this range of inter-related issues. They need to be considered together, in the context of the reasons to prioritise wider participation by older learners. The development of 'holistic' guidance services is a worthy goal but not at the expense of provision which might have a greater motivating effect on prospective older learners. If older people are to be motivated to learn then they have to feel that what they do is not only of value to them but is seen to have wider value. A funding structure which devalues non-vocational learning does not stimulate or give confidence to older people with the potential to continue learning.

If one also accepts the argument that lifelong learning is an essential tool for older people to develop and maintain healthy independent lives, as full citizens, with autonomy, self-worth and fulfilment then there is an added-value element, which shows that in the long term lifelong learning saves money. The need to develop dialogue with older people and help them develop the skills of confidently entering such dialogue is crucial to 'learning to grow older'.

With scarce public resources to be allocated the decisions concerning their allocation cannot be easy. For older people one hopes that the factors to be taken into consideration are known, clearly expressed and considered.

Key points

- Attitudes about older age are discriminatory, and limit adult participation in learning.
- Older women, elders from black and ethnic minority communities, and those who are

poor or working class have even less opportunity to access learning, as do those who are frail, or have learning difficulties and/or disabilities.

- Education and training providers need to target information, publicity and outreach programmes to locations where older people live.
- We need better educational advice and guidance services, relevant and accessible to older people.
- Older people are confined to a narrow range of curricular activities.
- A challenge for providers is to offer more mainstream subject opportunities, relevant to their interests and experience.
- Providers should build on the potential of mixed-age learning groups.
- Accreditation should be an option, and encourage progress within studies.
- We need coherent accreditation frameworks offering routes from informal, community-based and experiential learning through formal programmes, including FE and HE based qualification courses.
- Providers need to ensure accessible locations for learning, welcoming older people, and with support facilities to enable their learning.
- There needs to be additional resources to expand all forms of provision, including open and distance learning.
- There needs to be equitable funding mechanisms to support learners according to their needs, in both part-time and full-time programmes, through Individual Learning Accounts, with disadvantaged older adults as a priority target.

13 Recommendations

For more than a generation, NIACE has consistently argued the case, and recommended means, for widening adults' participation in learning programmes, particularly for those who have not benefited earlier. In this paper we have set out the reasons why older people, from the age of 50 onwards, have been excluded in the past, why they should be targeted for priority of access in the future, and indicated how this might be achieved.

Many of the points we continue to make will benefit all ages of adults wishing or needing to return to learn. For example, national government should invest substantial additional resources for adults' learning ensuring equitable funding of informal and formal learning opportunities, as well as part-time and full-time modes of study. There should be a funded adult entitlement to learning for all, through grants, loans and fee remissions available on the basis of need. Local Education Authorities' existing statutory duty to 'secure adequate facilities for further education' should be defined, and provision overall reviewed for coherence and adequacy through FEFCs, HEFCs and TECs as well as LEAs. Good quality local educational advice and guidance services should be provided for adult learners, to underpin the national freephone helpline 'Learning Direct', and coherent accreditation frameworks should be developed, to provide progression routes from informal and experiential learning, through formal provision.

Education providers should develop the curriculum in ways which are relevant to adult learners' needs and experience. Information, publicity and guidance on learning opportunities should be targeted towards those potential adult learners who have been excluded from access in the past, and outreach and distance learning provision developed, to provide more localised access to learning, responsive to communities' and individuals' needs. All providers should contribute to planning of provision as partners in local and regional Lifelong Learning Forums. All terrestrial broadcasting channels should be required to provide educational programmes for adults, in both mainstream prime-time as well as dedicated time-slots.

Here, however, we wish to emphasise what should be done to encourage and support wider participation by **older learners**, in different contexts.

The **Department for Education and Employment** is recommended to:

1. **Adopt as a policy priority increasing participation in education and training by older people, particularly those from the poorest socio-economic groups.**
2. **Ensure that Local Education Authorities prepare Lifelong Learning Development Plans, which take account of the learning needs of older people.**
3. **Ensure that policies to widen participation for older people give equal weight to informal and community-based as to formal learning, and that optional progression routes to certificated programmes are provided.**
4. **Make the active engagement of those older people without any post-school learning, and families including older relatives aged 50+ a key priority for funding.**

5. Invite the Further and Higher Education Funding Councils to report regularly on older people's participation in their funded provision.
6. Ensure that LEA Development Plans and local Lifelong Learning Forums address the role of voluntary organisations in contributing to adequate provision for older people.
7. Promote distance learning as a prime means of access for older people, through the University for Industry linked to broadcast media, and through the National Grid for Learning linking local libraries and other learning centres.
8. Initiate research about best practice in reaching older learners who are frail, whether housebound or in other care settings.
9. Ensure that measures to increase access to learning opportunities at work include older workers.

and with other Government Departments to:

10. Initiate research on the beneficial effects of older people's engagement in learning, and in voluntary work, as a preventative health and social care mechanism, prolonging active living.
11. Ensure that surveys and collection of statistics includes older people, extending across the age range to 75+, on a standard basis.
12. Promote positive images of older people, through publicity and in employment practices.
13. Set an example as an employer, by enabling older workers to make a smooth transition from employment to retirement, with access to new learning opportunities in order to do so.
14. Through the work of the Inter-Ministerial Group on Ageing, the Cabinet Office initiative Better Government for Older People and other Departmental initiatives, ensure that learning provision is an integral part of support services for older people, and is planned adequately at local, regional and national levels.

Local Authorities and Local Education Authorities are recommended to:

15. Ensure that Lifelong Learning Development Plans recognise older people's roles and contributions.
16. Assess the needs of older people as a priority, especially those disadvantaged by poverty, lack of previous education, poor health or disabilities, poor housing and transport, racial or other discrimination and taking into account how both informal and formal learning programmes can help.
17. Establish Lifelong Learning Forums involving partnerships of providers and other relevant statutory and voluntary agencies.
18. Develop co-ordinated inter-agency working, ensuring that learning has a key role across both statutory and voluntary services, drawing on the advice and models of good practice identified by the Better Government for Older People initiative.
19. Involve older people directly in service planning and delivery, empowering their voice as equal citizens, and also drawing on their resources as advocates, mentors, guides, researchers and sources of valuable experience for younger people in the community.
20. Develop equitable and coherent policies on fees and concessions available for older learners.

21. Promote positive images of older people, through publicity and in employment practices.

All education providing institutions are recommended to:

22. Ensure that the curriculum facilitates older people's learning, particularly giving access to the whole subject range, via short-term part-time as well as long-term full-time study modes, best served by modular programmes.
23. Build programmes on informal and experiential learning, particularly valuing life experience gained in other contexts and encouraging intergenerational learning groups.
24. Recognise and value the potential of older learners as mentors, researchers and volunteers.
25. Ensure that programmes offer options of day-time as well as evening attendance, and that teaching space and facilities are suitable for older learners, with appropriate technical aids to support their needs.
26. Ensure that coherent frameworks of accreditation are in place, allowing flexible entry and exit points with links among different sectors of provision, and valuing experiential learning, so that older learners might choose suitable progression routes.
27. Provide staff development and training programmes, to support teaching and learning by older learners, in different contexts and settings.
28. Ensure that marketing activities, publicity and promotional material reaches older people, and conveys positive messages about their involvement in learning opportunities.
29. Provide the support of accommodation and facilities for community groups directly involving and/or concerned with older people themselves.

Funding Councils and Institutions in Further and Higher Education are recommended to:

30. In the context of the planned expansion of FE and HE, plan provision and target funding to increase the numbers of learners aged 50+, especially those with little or no experience of education post-school.
31. Review and regularly report on participation by learners aged 50+.
32. Ensure data collection on learners extends through the age range to 75+, and is compatible with other data collection nationally.
33. Fund research into teaching and learning issues as they affect older people, and disseminate the outcomes of projects which can provide models of good practice in widening participation by older learners.
34. Establish and maintain quality assurance of provision appropriate to older learners, collaborating with QAA, OFSTED and other agencies as appropriate in relation to assessment and inspection.

Voluntary Organisations and Movements with a remit which includes older people, are recommended to:

35. Contribute advice and expertise to Lifelong Learning Forums, as equal partners with providers and other agencies.

36. Develop links with other voluntary agencies which have expertise in relation to issues for older people, such as pensions and finance, social and health, housing and transport services.
37. Identify older people most in need of better learning opportunities, and means of their inclusion.
38. Map existing provision against the socio-economic profile of local and regional communities, and collect data on learners' activity.
39. Help to identify older learners' curriculum needs, especially for community-based and outreach programmes to support those who currently participate least.
40. Ensure that information on informal and community-based learning opportunities is accessible via the national helpline Learning Direct, as well as local guidance services.
41. In consultation with Open College Networks and other relevant agencies develop accreditation systems which link informal and experiential learning to formal programmes.
42. Involve users directly in determining and monitoring programmes of learning for older people.
43. Promote opportunities and support for older people as volunteers, guides, mentors and researchers, recognising them as a resource for inter-generational learning.
44. Support the establishment of better means of funding older learners via targeted bursaries, grants or loans.

Employers, Trade Unions and Training and Enterprise Councils are recommended to work together to:

45. Value the experience and skills of older workers, and ensure equitable access to education and training for older workers.
46. Ensure that equal opportunities policies and strategic business plans identify older workers as a target for positive action.
47. Develop a strategy to deal with ageist attitudes within the work force, with appropriate staff development and training.
48. Aim to achieve an age-balanced workforce which integrates learning by experience, passing on skills from older to younger workers.
49. Support equitable recruitment and exit strategies, with flexibility of contracts to allow for transition to part-time working, temporary shorter working hours to meet family commitments, secondment to volunteering and mentoring roles, and equal access to learning opportunities for older workers especially.
50. Promote the recruitment of older workers who have been unemployed for more than 6 months.
51. Provide equitable access to work-related training for all ages of employees, both part-time and full-time, short or continuing contract, targeting especially older women who have not benefited previously.
52. Provide to all employees regardless of age, funded entitlement to non-work-related education for personal development of their choice, as part of the remuneration package, to encourage active continuing learning into older age.

53. Support the establishment of Individual Learning Accounts and ensure funding contributions by individuals or from public expenditure sources are matched by employers.
54. Ensure that national and local government, and the health service, as the largest public-sector employers, lead by example in implementing equal opportunities for older workers.

Broadcasters and other distance learning media are recommended to:

55. Promote positive attitudes to lifelong learning, as a public service.
56. Provide programmes to encourage participation in civic affairs and citizenship, health and social welfare, especially targeting older people.
57. Ensure mainstream coverage of issues affecting older people, as a major element of social development.
58. Ensure positive images of older people's experience, skills and authority using role models as presenters and in star parts, avoiding stereotypes.
59. Build on successful practice in providing good quality learning through programmes and support materials, targeted towards older people.
60. Support distance learning approaches drawing on models developed by the Open University and the Open College of the Arts.
61. Ensure access by means of appropriate media, timing, presentation and affordable cost, for older learners.
62. Ensure that information on learning programmes and materials is featured through the national helpline Learning Direct, and local educational guidance services.
63. Work with the University for Industry, and the National Grid for Learning to develop new themes and programmes accessible by digitised ICT, ensuring access by older people.

Abbreviations

ACACE	The Advisory Council for Adult and Continuing Education
ACE	Advisory Centre for Education
ALE	Adult Learning Exchange
AE	Adult Education
ALBSU	Adult Literacy and Basic Skills Unit (new Basic Skills Agency)
AP(E)L	Assessment of Prior (Experiential) Learning
APL	Assessment of Prior Learning
BARB	British Audience Research Bureau
CATS	Credit Accumulation and Transfer Schemes
CPA	Centre for Policy on Ageing
CRAC	Careers Research and Advisory Centre
CRE	Commission for Racial Equality
DETR	Department of the Environment, Transport and the Regions
DfEE	Department for Education and Employment
DVV	Deutscher Volkshochschul -Verband
EAEA	European Association for the Education of Adults
F&HE	Further and Higher Education
FEFC	Further Education Funding Council
FREE	Forum for the Rights of Elderly People in Education
GLC	Greater London Council
HEFCE	Higher Education Funding Council for England
HESA	Higher Education Statistics Agency
ICT	Information and Communications Technology
ILEA	Inner London Education Authority
IT	Information Technology
LEA	Local Education Authority
LEAFEA	Local Education Authorities Forum for the Education of Adults
LGA	Local Government Association
LLL	Learning in Later Life; Lifelong Learning
MORI	Market and Opinion Research International
NABCE	Non Award Bearing Continuing Education
NALS	National Adult Learning Survey
NFWI	National Federation of Women's Institutes
NIACE	National Institute of Adult Continuing Education (England and Wales)
NICEC	National Institute for Careers Education and Counselling
NLCB	National Lotteries Charity Board
OCN	Open College Network
OECD	Organisation for Economic Co-operation and Development
OFSTED	Office for Standards in Education
QAA	Quality Assurance Authority
RNIB	Royal National Institute for the Blind
RNID	Royal National Institute for the Deaf
RSG	Rate Support Grant
SRHE	Society for Research into Higher Education
TEC	Technical Education Council
U3A	University of the Third Age
UCACE	Universities Council for Adult Continuing Education

UDACE	The Unit for the Development of Adult Continuing Education in England and Wales
UNESCO	United Nations Educational, Scientific and Cultural Organisation
WEA	Workers Educational Association
WISCP	West Indians Senior Citizens Project

Appendix 1 – Additional statistics

These statistics and table support and expand the information provided in Chapter 4 on Demography.

Figure A.1 shows the projected number of older people in Europe by the year 2025. From a baseline of 1980, this increase is expected to be 70 per cent at a time when the general population will increase by 6.4 per cent. For those over the age of 80, the increase will be 115 per cent!

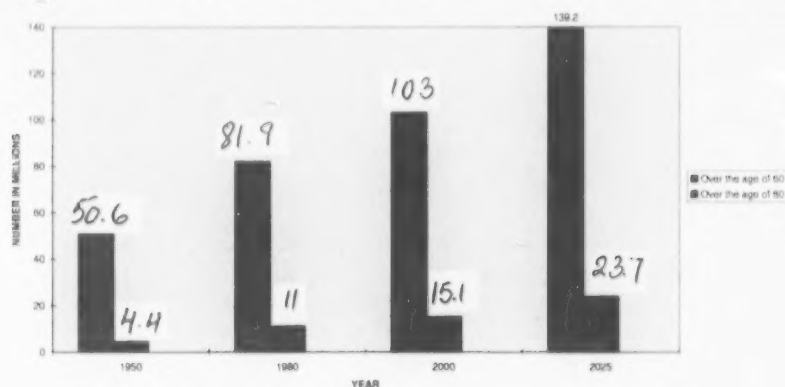


Figure A.1 Number of people 60+ and 80+ in Europe, 1950–2025

Source: Dooghe, G *The Ageing of the Population in Europe: Socio Economic Characteristics of the Elderly Population*, EEC, Brussels 1992, Table 1.16

Figure A.2 shows the percentage increase in the population of the United Kingdom for the same period. The actual increase is expected to be only 41.2 per cent (when the general population will increase by 5.9 per cent).

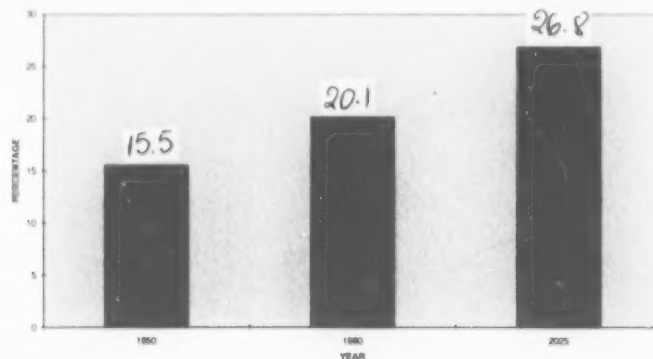


Figure A.2 Percentage of people 60+ in the UK 1950–2025

Source: Dooghe, G *The Ageing of the Population in Europe: Socio Economic Characteristics of the Elderly Population*, EEC, Brussels 1992, Table 1.5: 1.6

Figure A.3 shows the projected change in the number of those aged 75+ and 85+ in the UK between 1996 and 2011. The projected increases are expected to be 7.7 per cent and 18.8 per cent respectively.

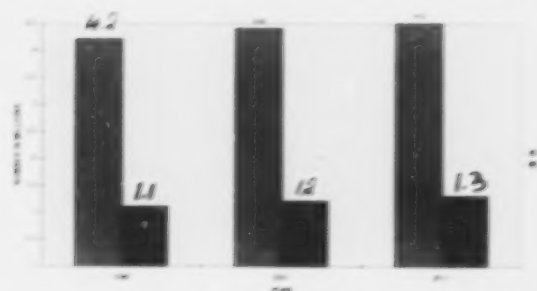


Figure A.3 Projected change in the number of people 75+ and 85+ in the UK, 1996-2011

Source: National Population Projections, 1994 (in *Older People in the UK: Some Basic Facts*, 1997, Age Concern England)

Figures A.4 to A.9 look at life expectancy and the changes this century and projected into the next. Although Figure A.4 shows a steady improvement in life expectancy over the last century this disguises gender and occupational differences.

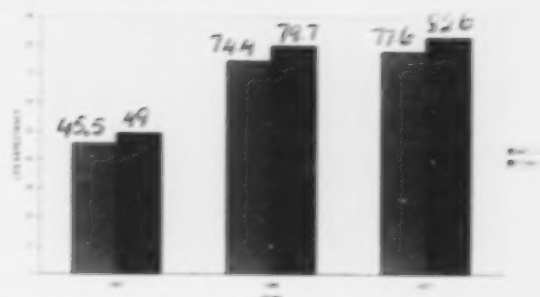


Figure A.4 Differences in life expectancy

Source: Government Actuary's Department, *The Third Age: The Continuing Challenge*, Carnegie Third Age Programme, 1996

Figure A.5 shows even more graphically the changes. In 1901 a woman age 60 was expected to live a further 14.6 years. By 1996 this had risen to 22.6 years. Between 1901 and 2021 the further years of life of a woman age 80, will have almost doubled, from 5.3 to 10 years.

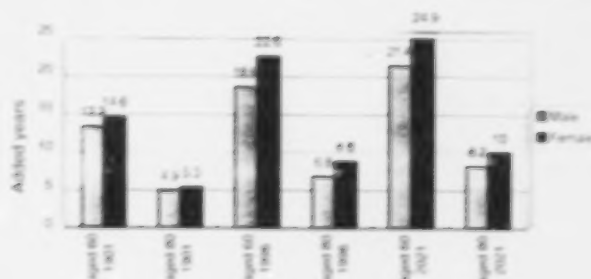


Figure A.5 Life expectancy of men and women in the UK 1901-2021, at the age of 60 and 80

Source: *The Third Age: The Continuing Challenge*, The Carnegie UK Trust, 1996

Figure A.6 shows the impact of the differing trends in male and female life expectancy, as the result of falling birth rate and improved longevity.

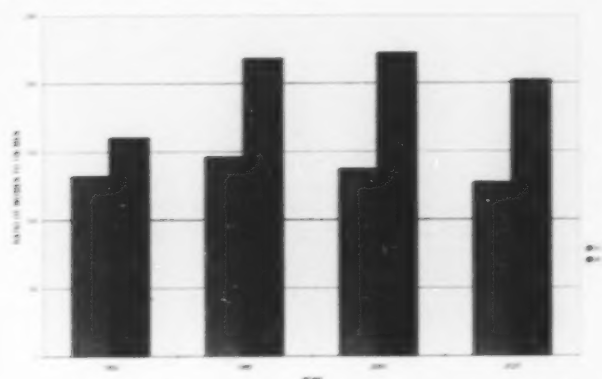


Figure A.6 Sex ratio of women to 100 men, of the elderly population in Europe

Source: Dooghe, G. *The Ageing of the Population in Europe: Socio Economic Characteristics of the Elderly Population*, EEC, Brussels 1992, Table 1.5: 1.6

Figure A.7 indicates that life expectancy is greater for those higher up the social scale (in professional and managerial jobs). Poor people are ill more often and die younger and the inequality has widened in recent years.

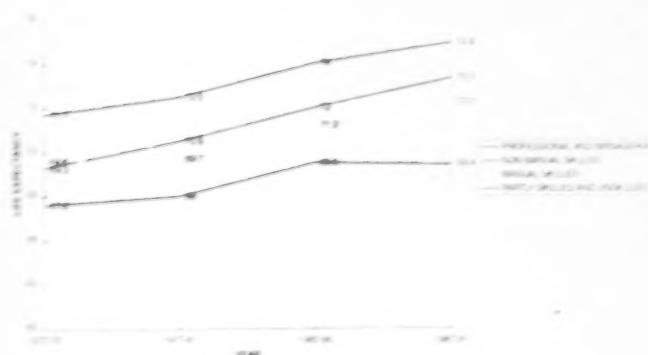


Figure A.7 Life expectancy by social class 1972-1991

Source: *Our Healthier Nation - Fit for the Twenty-first Century*, 1998

Figure A.8 shows the impact of unemployment on life expectancy.

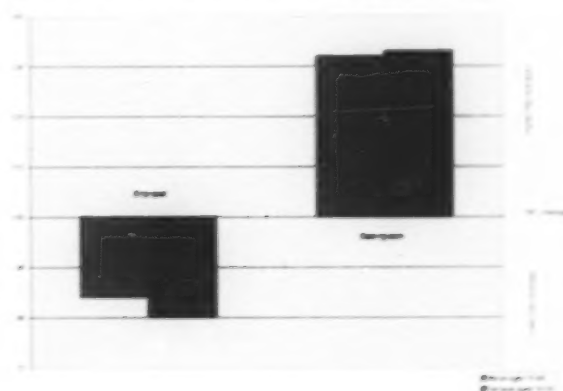


Figure A.8 Relative mortality of employed/unemployed by sex, England and Wales, 1981-1992

Source: *Our Healthier Nation*, Chapter 2, Figure 7

Figure A.9 indicates the reversal of the relative proportion of young and old in Europe.



Figure A.9 Young and old people: reversal of the relative proportions of the population
Source: *The Demographic Situation in the EU, 1995*

Figure A.10 shows the changes in age-related dependency ratios of those economically active in the population and the proportion they need to support.

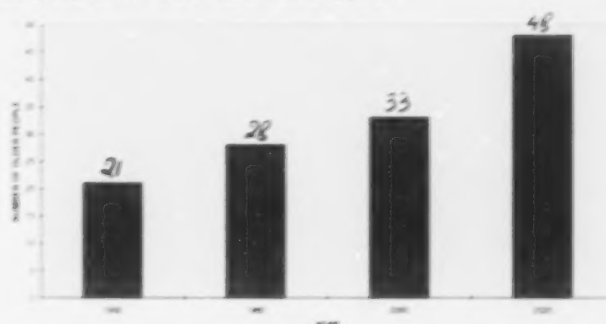


Figure A.10 Number of people over the age of 60 that 100 people of active age in Europe are expected to support 1950–2025

Source: Dooghe, G. *The Ageing of the Population in Europe: Socio Economic Characteristics of the Elderly Population*, EEC, Brussels 1992, Table 1.13

Table A.1 shows that the surge of 60+ people has not yet reached most of the black and minority ethnic groups but will do so over the next 20 years.

In 1996 people from ethnic minority groups represented just under 6 per cent of the population – over 3 million people. (*Social Trends*, 1997 Table 1.8)

12 per cent of the Indian population were aged 55 or over;
8 per cent of the Bangladeshi population;
6 per cent Black African;
8 per cent Pakistani;
17 per cent of the Black Caribbean population; and
25 per cent of the white population

Britain is experiencing its first substantial generation of black and minority ethnic elders. However in the next 20 to 40 years their number is set to increase tenfold, and yet ethnic minority elders are not a significant focus of social policy planning. (CRE/ACE Information Pack, *Age and Race: Double Discrimination*, 1995)

Table A.1 Population: by ethnic group and age, Spring 1995, Britain

Percentages	Under 16	16-29	30-44	45-59	60 and over	All ages (=100%) (thousands)
<i>Ethnic minority group</i>						
Black ¹	29.0	25.5	27.0	11.3	7.2	869
Indian	25.3	26.0	25.5	16.0	7.2	844
Pakistani/ Bangladeshi	40.6	26.4	19.4	9.3	4.3	725
Other ¹	37.2	23.3	26.0	9.6	3.9	773
<i>All ethnic minority groups</i>	32.6	25.3	24.6	11.7	5.8	3211
White	20.1	19.0	21.6	18.3	20.9	52844
<i>All ethnic groups³</i>	20.9	19.4	21.8	18.0	20.1	56072

Source: Labour Force Survey, Office for National Statistics, in Carnegie, *Third Age: The Continuing Challenge*, 1997, Table 1.3, page 97.

¹Includes Caribbean, African and other Black people of non-mixed origin.

²Includes Chinese, other ethnic minority groups of non-mixed origin and those of mixed origin.

³Includes ethnic groups not stated.

Appendix 2 – Acknowledgements and Advisory Group

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LEARNING TO GROW OLDER & BOLDER

Shiela Carlton and Jim Soulsby

This policy discussion paper, based on NIACE's Older & Bolder programme of work, aims to encourage wider awareness of the factors obstructing fair access to learning opportunities for older people aged 50 and over. It makes the case for more and better provision targeted towards this age group, for work as well as personal fulfilment.

NIACE believes that participation in learning sustains active, independent lives and empowers citizens. Older & Bolder believes that older people have a huge contribution to make, from their accumulated experience, valuable to younger generations and to the whole community. Real lifelong learning must include older as well as younger people, learning together.

The paper will be helpful to those with an interest in social policy around an ageing population, as well as those concerned with wider participation and choice in all forms of education and training. It covers the background of demographic factors, NIACE survey work on older people's lack of participation in learning, and the reasons why this needs to be redressed as a matter of urgency. Different settings and sectors of education provision are described with examples of good practice and testimonies from the learners themselves. The paper identifies a range of new government initiatives, including the Better Government for Older People programme. A range of major issues and recommendations for change are set out.

This substantial publication will be of value to those working in different roles within:

- national and local policy making, for service provision;
- providers of learning programmes, in all different forms of education and training;
- voluntary sector organisations, particularly those concerned to support older people directly;
- older activists themselves.

It adds to a substantial body of work identifying the need to deal equitably with participation in learning. This is especially so for those who are marginalised as they grow older, because they are poor, vulnerable or frail, or continue to be excluded by racial or other discrimination.

NIACE Older Bolder



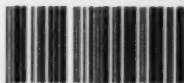
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NIACE, the national organisation for adult learning, has a broad remit to promote lifelong learning opportunities for adults. NIACE works to develop increased participation in education and training. It aims to do this for those who do not have easy access because of barriers of class, gender, age, race, language and culture, learning difficulties or disabilities, or insufficient financial resources.

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